

Exercise C. Change in statement of responsibility and main and added entries

Record updated:

```
100 1_ Stein, Joseph P., $d 1953-  
245 10 Publishers of non-fiction articles $h [electronic resource]  
: $b a database for writers / $c by Joseph P. Stein and Julia  
Garcia.  
500 Title from home page (viewed on Dec. 15, 2002).  
500 Co-authored by Susan E. Morton <Jan. 22, 2001>  
700 1_ Garcia, Julia M., $d 1961-  
700 1_ Morton, Susan E., $d 1955-
```

The changes:

- Different statement of responsibility.
- Entails different main entry because new name is given first in the resource.
Former added entry moved to main entry.
- Note on previous co-author, if considered important for description/identification.
- Former main entry moved to added entry if considered important for continued access.

Optional Exercise D. Final iteration of updating loose-leaf

Record updated:

```
008    DtSt: m    Dates: 1989,2002
006    Freq: a    Regl: r    SrTp: 1    S/L: 2
245 00 Guidelines for typewriting doctoral dissertations.
260    Ann Arbor, MI : $b University of Michigan Press,
      $c 1989-2002.
300    2 v. (loose-leaf) ; $c 28 cm.
310    Updated annually, $b 1997-2002
321    Updated semiannually, $b 1989-1996
```

The changes:

- The record is “closed off”
- Ending dates of publication are entered in 260 \$c (because you have the final iteration) and 008 Dates fields.
- The number of volumes is entered in 300 \$a
- The dimensions are changed to reflect the latest iteration.
- The range of dates applying to the last frequency of updates may be added.



Session 4

Copy Cataloging, Record Modification, and Record Maintenance for Integrating Resources

In this session we turn from the ideal way that cataloging and updating will be done under the new rules and turn to the ‘real world’ of records as they actually exist in current databases.

Optional Warm-up Exercises:

- This session will consist mostly of questions and issues for discussion, so instructors may wish to skip any warm-up exercises. If desired, however, the instructor might ask the participants: what issues are likely to come up when copy cataloging? What issues and problems in searching for existing records? In identifying the correct matching record for an integrating resource? What will need to be modified? When will a new record be needed for a resource?

Instructor References:

- None, but instructors may wish to peruse CONSER Cataloging Manual, 2002 ed., Module 21, by Bill Anderson as background for how that program deals with similar issues in the cooperative cataloging of serial resources.



Goals of Session 4

Explore and discuss:

- Issues in identifying existing records for integrating resources
 - Especially if access points, by which you search for matching records, have changed
- Issues in modifying existing records cataloged under old rules and practices
 - How much needs to be changed?
- Issues in ongoing maintenance of records for integrating resources

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The goals of the session are to explore the issues --through looking at some examples, but mostly through asking questions and through discussion of possible solutions.

- Catalogers of integrating resources, especially electronic integrating resources, may have more questions than answers right now.
- There is little if any definitive documentation to date on how these issues should be dealt with. This is hardly surprising. We are in the midst of the development right now, and perhaps all participants in these workshops can play a valuable role in expressing ideas, opinions, etc. for future guidelines and solutions.
- It should be well noted, however that:
 - Many of these issues are the same as catalogers of Internet resource has been facing for the last decade or so, since cataloging these began under OCLC in 1994.
 - Many of them are definitely issues that catalogers of loose-leafs and serials have been facing for much longer.
- The serials cataloging community has developed policies and guidelines for many of these issues, evident, for example, in CONSER documentation. [See CONSER Cataloging Manual Module 21 by Bill Anderson, Library of Congress.]

Participants' Goals:

- You might ask the participants if they have any additional or more specific goals or areas that they especially want to discuss or learn about in this session.



Searching for existing records for IRs

- How to search?
 - Are title, publisher, responsible persons or bodies, and/or URI the same in the existing record as in the iteration of the resource you are viewing
 - Helpful: OCLC Connexion Resource Catalog allows searching by "URL words" and "URL phrases" (see next slide)
- Search results will reflect past cataloging practice
 - For example: Iterations vs. editions:
 - What are now iterations of an IR may have been treated as separate editions of a monograph
 - There may be multiple records for different 'editions' or 'releases' of an integrating resource that today would be cataloged on one record.

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- Besides searching multiple ways in the bibliographic utility, a cataloger on an online resource will want to search, in multiple ways if needed, via Internet search engines to find the resource itself, and will compare the resource as it now appears with what exists on any potential matching existing bibliographic records.

OCLC Connexion URL searching

From Connexion online HELP:

Limit search to URL index

- Two URL indexes are available: URL (phrase) and URL (word).

- **Select the URL (phrase) index when you want to find records that contain a URL exactly matching your search term.** Include as much of the URL as you know. You can include or omit *http://*. Enter the complete URL, beginning with *www.* (or other first segment) and all separator characters (*.* and */*) to retrieve exact matches. If you are unsure of the parts following the domain name, type a single slash after the domain and then add an asterisk to match any URLs that begin with this domain. **Examples:** *http://www.noaa.gov/** or *http://www.uic.edu/**.

- **Select the URL (word) index to find records that contain URLs in which a particular word occurs.** Omit separator characters. Include only the significant word(s). **Examples:** *nasa* or *amazon* or *uic* and *lib*.

This slide is for reference purposes for those who use OCLC Connexion.

- The “Resource Catalog” is an alternative choice to WorldCat –it accesses the portion of WorldCat that migrated from the old CORC database –that is, records for Internet resources only.
- It has unique methods for searching, etc., not found in the regular WorldCat search interface within Connexion.
- The ability to search by parts or whole URIs is very valuable in cases where titles and name entries may have changed. It depends on what citation a cataloger is given by which to search.

OCLC Connexion URL searching

OCLC Connexion - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://connexion.oclc.org/WebZ/html/corc/>

OCLC Connexion Home | Help | Diacritics | Contact | Logoff

Cataloging Authorities Express Pathfinders General

Search Browse Create Show

Resource Catalog Browse Options Create Options Show Options

Search

Resource Catalog

for

AND

AND in

AND in

☒ Do relevance ranking.

Search Reset

Quick Tip
To search for 2 or more terms in the same index, type the terms in 1 text box and select an index. Spaces between words are treated as AND operators. You can also combine terms with **OR** and/or exclude terms with **NOT**.

Quick Tip
When relevance ranking of search

This slide illustrates graphically what was explained on the previous slide.

It may be of use to OCLC users for reference when they take their printed materials back to their institutions.

Search results in OCLC WorldCat: *Scholarly electronic publishing bibliography*

8 records found by scan title search in WorldCat:

1. Scholarly Electronic Publishing Resources [electronic resource].
Electronic data. University of Houston Libraries, **2000-06-20**. [COMPUTER FILE]
OCLC: 44480522
2. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic
publishing bibliography / Charles W. Bailey, Jr. **Version 2:11/15/96**. Houston,
TX : University Libraries, University of Houston, **1996**. OCLC: 37697102
3. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic
publishing bibliography [electronic resource] / Charles W. Bailey, Jr.
Electronic data [Houston] : University of Houston Libraries, **c1996-**
[ELECTRONIC] OCLC: 35870002
4. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic
publishing bibliography / Charles W. Bailey, Jr. **Version 11:8/25/97**. [Houston]
: University of Houston Libraries, **c1997**. OCLC: 37697302
5. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic
publishing bibliography / Charles W. Bailey, Jr. **Version 22:11/20/98**. [Houston]
: University of Houston Libraries, **c1998**. [COMPUTER FILE] OCLC: 44377149
6. Bailey, Charles W. (Charles Wesley), 1950- Scholarly electronic
publishing bibliography / Charles W. Bailey, Jr. **Version 16:2/19/98**. [Houston]
: University of Houston Libraries, [c1998] OCLC: 38731132
7. Bailey, Charles W., 1950- Scholarly electronic publishing bibliography /
Charles W. Bailey. **Version 39 : 10/24/2001**. Houston, Tex. : University of
Houston Libraries, c2001. [REPRODUCTION] OCLC: 48992925
8. Bailey, Charles W., (Charles Wesley), 1950- Scholarly electronic
publishing Bibliography / Charles W. Bailey. **Version 41: 2/22/2002**. Houston :
University of Houston Libraries, **2002**. [REPRODUCTION] OCLC: 49516825

A random example of the results of a search for an online integrating resource.

What to point out:

- Multiple records created for various versions of this bibliography –what are now considered different iterations of the same resource, to be accounted for on a single bibliographic record.
- Record 3 on the list appears to have been created as an “open” record for the entire resource, encompassing all future ongoing iterations, which is what we would do now.
 - It looks to be a good candidate for use as a record to use for the integrating resource.
- There are also records created for reproductions of the bibliography. These may be locally-made hard copies, printed out from the Web pages by individual institutions, where the local printout is cataloged.
- Imagine if all 40+ existing iterations, and all future iterations, of this integrating bibliography, were to have a separate record created for it! And every institution created a separate record for its own local printed reproduction of various iterations!

This is a great illustration of why we have the new rules for cataloging these kinds of resources, and why the integrating entry cataloging convention makes so much more sense than creating new records for every version!

Search results in OCLC WorldCat:

USDA National Nutrient Database for Standard Reference

9 records found by scan title search in WorldCat:

1. USDA national nutrient database for standard reference. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [SERIAL] [ELECTRONIC] OCLC: 51231416
2. USDA national nutrient database for standard reference [electronic resource]. **Release 15.** Electronic data and program. Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [2002]- [COMPUTER FILE] AGL OCLC: 50863495
3. USDA nutrient database for standard reference [electronic resource]. Riverdale, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [1999- [SERIAL] [ELECTRONIC] DLC OCLC: 435641
4. USDA Nutrient Database for Standard Reference [electronic resource]. **Release 12** [Riverdale, Md.] : Nutrient Data Laboratory, Agricultural Research Service, Beltsville Human Nutrition Research Center, [1999] [ELECTRONIC]: 41907546
5. USDA nutrient database for standard reference [electronic resource]. **Release 12.** Riverdale, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, [1999] **1 computer optical disc ; 4 3/4 in.** [COMPUTER FILE]: 41315784
6. USDA nutrient database for standard reference [electronic resource]. **Release 13.** Beltsville, Md. : USDA, Nutrient Data Laboratory, Agricultural Research Service, 2000. **1 computer optical disc ; 4 3/4 in.** [COMPUTER FILE] OCLC: 44093926
7. USDA nutrient database for standard reference [electronic resource] / Nutrient Data Laboratory, Agricultural Research Service. **Release 14.** [Beltsville, Md.?] : The Laboratory, [2001] [ELECTRONIC] PCC OCLC: 49526685
8. USDA Nutrient Database for Standard Reference [electronic resource]. **Release 14.** [Riverdale, Md.] : Nutrient Data Laboratory, Agricultural Research Service, Beltsville Human Nutrition Research Center, [2001] [ELECTRONIC]: 48808234
9. USDA nutrient database for standard reference [electronic resource]. **Release 14.** Beltsville, Md. : Nutrient Data Laboratory, Beltsville Human Nutrition Research Center, Agricultural Research Service, [2002] **1 CD-ROM ; 4 3/4 in.** [COMPUTER FILE] PCC OCLC: 50048252

A similar example for one of our resources from Session 2.

Some of these are for the CD-ROM version; and this is as it should be: the online and CD-ROM versions should have separate records, which can now be linked via linking entries in each record.

One record for this database has been cataloged as a serial

```
OCLC: 51231416
Type: a   ELvl: I   Srce: d   GPub:   Ctrl:   Lang: eng
BLvl: s   Form: s   Conf: 0   Freq: u   MRec:   Ctry: mdu
S/L: 0   Orig:   EntW:   Regl: u   ISSN:   Alph:
Desc: a   SrTp:   Cont:   DtSt: c   Dates: 2002,9999
006      m d
007      c #b r #d c #e n
245 00 USDA national nutrient database for standard reference #h
[electronic resource].
260      Beltsville, Md. : #b USDA, Nutrient Data Laboratory,
Agricultural Research Service,
362 1_ Electronic coverage as of 2002?
500      Description based on: Release 15 (2002); title from title
screen (viewed Dec. 16, 2002).
516      text/html
538      System requirements: Internet access; World Wide Web browser.
538      Mode of access: World Wide Web.
856 40 #u http://www.nal.usda.gov/fnic/cgi-bin/nut%5Fsearch.pl
```

Note that the database has been treated here as a serial.

Another record has been cataloged as a monograph for the latest release only

```

OCLC: 50863495
Type: m    ELvl: I    Srce:      Audn:      Ctrl:      Lang: eng
BLvl: m    File: m    GPub: f    MRec:      Ctry: mdu
Desc: a                                DtSt: m    Dates: 2002,9999

007      c #b r #d m #e n
245 00 USDA national nutrient database for standard reference #h
[electronic resource].
246 1_    #i Title from HTML header: #a USDA nutrient database for
standard reference
250      Release 15.
256      Electronic data and program.
260      Beltsville, Md. : #b USDA, Nutrient Data Laboratory,
Agricultural Research Service, #c [2002]-
538      Mode of access: WWW browser; files also available for
download in DBF or ASCII text format.
500      Title from Web page (viewed on Oct. 25, 2002).
530      Also available on CD-ROM.
650      _0 Food #x Composition #v Databases.
856 40    #u http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html

```

In contrast to our ideal record from the end of Session 2, as this resource would be cataloged according to the new rules, this is the actual existing record the latest release (number 15) of the USDA National Nutrient Database for Standard Reference.

- It illustrates what we find in the real world when searching for an existing record.
- This record was very well done and cataloged correctly according to pre-2002 release rules.

We will come back to this example and to others shortly ahead in this session to look at the elements and what should or might be changed when copy cataloging.




Identifying and selecting existing records

- Finding an existing record
 - Is there a record that matches the resource I am cataloging?
 - Which record should I choose? (e.g., from search results on previous slides)
- Identifying the iteration
 - Which iteration am I viewing?
 - Which iteration was the original cataloger --or previous reviser-- of the record viewing?
 - Check the description based on / date viewed note!

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These are the questions. The answers will be as varied as the diverse situations that we will actually encounter.

In cases where a cataloger does identify an existing record for the resource selected for cataloging, one of the first things to do now will be to look for the date viewed / description based on note and compare it with the date on which the cataloger is viewing the resource.



Existing records created before Dec. 1, 2002

- **All cataloged as monographs, not as IR!**
- Will not reflect new rules or MARC tagging, for example:
 - No 006 coding for IR present
 - Former title proper in 500 or 246, not 247
 - Edition statement in 250 that would no longer be recorded as such
 - Publication dates in 260 \$c when not from first iteration, e.g.: [199-?]-
 - Frequency of updates note in 500, not 310, or no frequency note at all
 - Bibliographic relations noted in 5XX fields; no links

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This is what we will find as we begin with the new rules.

We will need to ask ourselves: which of these elements should we edit / modify in existing records and which not? Which are crucial? Which important? Which optional? Which trivial? --See the next slide.



Modifying existing records

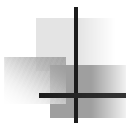
- How much in a record should be changed?
 - When is it critical to make changes?
 - When is it important to make changes?
 - When is it unimportant to make changes?
- How to deal with mixed practice?
 - Cataloging done according to various versions of AACR and LCRI
 - Valid at the time; data still accurate
- When to report needed changes to OCLC?
 - If no authorization to edit master record
 - When multiple records could be collapsed under new rules
- How have serials and loose-leaf catalogers approached these issues?

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One answer: **always add the new CR 006 with the new IR values, especially the Type of Continuing Resource element and the Entry Convention element,** whenever touching an existing record!

If you have authorization to modify master records, do so.

If not, follow local policies about making this change in your local system.



LC practice: when you have later iteration


- Update the description and add access points to reflect the current iteration as needed
- Accept the 260 \$c in the existing record
- Add notes and access points if different information on other library's earlier iteration is important
- Add or update the "Description based on" note to reflect the current iteration
- Update 008 and update/add CR 006 as needed

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If LC's iteration is later, LC follows the steps on this slide.

- Accepting the 260 subfield \$c in the other library's record is a change in LC practice.

This and the following slide have been borrowed from a presentation for LC catalogers by Judy Kuhagen and David Reser



LC practice: when you have earlier iteration

- Do not change the description to reflect your (earlier) iteration
- Accept the 260 \$c in the existing record
- Add notes and access points if different information on your (earlier) iteration is important
- Do not change the "Description based on" note to reflect your (earlier) iteration
- Do not change the 008/006 to reflect your (earlier iteration); but do add CR 006 if lacking

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If LC's iteration is earlier, LC follows these steps.

LC does not remove a 260 \$c in the copy cataloging record.

Existing record for USDA National Nutrient Database

```

OCLC: 50863495
Type: m    ELvl: I    Srce:      Audn:      Ctrl:      Lang: eng
BLvl: m    File: m    GPub: f    MRec:      Ctry: mdu
Desc: a                                DtSt: m    Dates: 2002,9999

007      c #b r #d m #e n
245 00 USDA national nutrient database for standard reference #h
[electronic resource].
246 1_ #i Title from HTML header: #a USDA nutrient database for
standard reference
250      Release 15.
256      Electronic data and program.
260      Beltsville, Md. : #b USDA, Nutrient Data Laboratory,
Agricultural Research Service, #c [2002]-
538      Mode of access: WWW browser; files also available for
download in DBF or ASCII text format.
500      Title from Web page (viewed on Oct. 25, 2002).
530      Also available on CD-ROM.
650 _0 Food #x Composition #v Databases.
856 40 #u http://www.nal.usda.gov/fnic/foodcomp/Data/SR15/sr15.html

```

You might ask participants what issues they see entailed in how a cataloger could and should modify this record if copy cataloging today.

Issues, some major, some minor, include:

- BLvl = M (monograph); no 006 for CR present; not codes unique to IR
- Edition statement present for frequently changing release information; and this record was created to represent only Release 15; illustrates how we can now treat the database as an integrating resource using one record rather than a monograph using multiple separate records for each release: treat releases as iterations of the same work rather than as new editions / new works
- 256 is present, as it will be in tens of thousands of records: local decisions whether to retain or delete (LC retains if present on copy, does not add to originals)
- 530 note for other format available; no linking entry. Should one be added? If so, record for CD-ROM should also be edited to add the reciprocal link to this record.
- 856: shows that the URL is for Release 15: the selection of main page of entry to this database, as well as chief source of information, may need to be reconsidered.

Existing record for Scholarly Electronic Publishing Bibliography

```

OCLC: 35870002
Type: a    ELvl: I    Srce: d    Audn:      Ctrl:      Lang: eng
BLvl: m    Form: s    Conf: 0    Biog:      MRec:      Ctry: txu
          Cont:      GPub:      LitF: 0    Indx: 0
Desc: a    Ills:      Fest: 0    DtSt: m    Dates: 1996,9999
006      m d
007      c #b r #d m #e n #f u
090      Z286.E43 #b B34 1996
100 1_ Bailey, Charles W. #q (Charles Wesley), #d 1950-
245 10 Scholarly electronic publishing bibliography #h [electronic
resource] / #c Charles W. Bailey, Jr.
256      Electronic data.
260      [Houston] : #b University of Houston Libraries, #c c1996-
538      Mode of access: Internet.
500      Title from title screen (viewed on Nov. 8, 1996).
500      Original edition statement: Version 1, 10-25-96; updated
irregularly.
856 40 #u http://info.lib.uh.edu/sepb/sepb.html #3 HTML version
856 40 #u http://info.lib.uh.edu/sepb/sepb.pdf #3 PDF version

```

This is a record wisely created for the bibliography as an ongoing resource, rather than for a particular version of this frequently changing online resource.

Note especially the 500 note on the editions statement.

This is a great example of how catalogers used their good judgment to in effect anticipate the current rules for IRs, and how the rules now codify what was good cataloging practice when following the rules literally was not.

Some of these practices were laid out in the 1980's in *Cataloging rules for the description of looseleaf publications* by Adele Hallam. Many of the practices outlined in Hallam's work were incorporated into chapter 12 rules for integrating resources in the 2002 revision.

Existing record for KnowThis.com

```

OCLC: 44281054
Type: a    ELvl: 3    Srce: d    Audn:      Ctrl:      Lang: eng
BLvl: m    Form: s    Conf: 0    Biog:      MRec:      Ctry: pau
        Cont:      GPub:      LitF: 0    Indx: 0
Desc: a    Ills:      Fest: 0    DtSt: m    Dates: 1998,9999
006      m d
007      c #b r #d c #e n #f u
245 00 KnowThis.com #h [electronic resource] : #b marketing virtual
library.
246 1_ #i Title in HTML header: #a KnowThis.com : #b for market research,
Internet marketing, advertising, selling & more
246 1_ #i Former title: #a KnowMarketing : #b the Internet's marketing
virtual library
246 1_ #i Former HTML source title: #a TMVL, reference for marketing,
selling, advertising, promotion, e-commerce
256      Electronic text data.
260      West Chester, Pa. : #b West Chester University, #c c1998-
538      Mode of access: World Wide Web.
500      Title from title screen (viewed on Apr. 1, 2002) .
500      This site is part of the World Wide Web virtual library and is
created and maintained by West Chester University.
500      Frequently updated.
856 40 #u http://www.knowthis.com

```

Here is another example of cataloging before the implementation of the new rules for IRs that incorporated into the record notes and access points for earlier forms of the title, and included a statement of “Frequently updated.”

A cataloger could now change these 246s to 247s, but is this necessary? Important? Optional? Better left as is since was done correctly at the time and still provides access to the earlier forms of title?

What about publication date? The “viewed on” date shows that the record was not based on the first iteration. LC policy, as shown in previous slides, is to accept that date as is.

Another existing record, Encoding level K

```

OCLC: 44480522
Type: m   ELvl: K   Srce: d   Audn:      Ctrl:      Lang: eng
BLvl: m    File: d    GPub:      MRec:      Ctry: xxu
Desc:                               DtSt: e   Dates: 2000,0620
245 00 Scholarly Electronic Publishing Resources #h [electronic
resource].
246 3_ Scholarly electronic publishing bibliography.
256      Electronic data.
260      #b University of Houston Libraries, #c 2000-06-20.
538      Mode of access: World Wide Web.
500      Title from title screen.
516      HTML text and graphics.
538      Mode of access: World Wide Web.
500      Description based on view on: 06-20-2000.
650 _0 Scholarly electronic publishing #x Computer network resources.
650 _0 Internet publishing #x Computer network resources.
650 _0 Libraries and electronic publishing #x Computer network
resources.
650 _0 Electronic publishing #x Computer network resources.
710 2_ University of Houston. #b Libraries.
856      #q text/html #u http://info.lib.uh.edu/sepb/sepr.htm

```

This example is included because it illustrates a not uncommon type of record found for online resources in the OCLC database. (Encoding level K = Less- than full cataloging input by OCLC participating library)

Many of these kinds of records were originally created as Dublin Core records, not according to AACR2 standards, and mapped into MARC tagging. [DC records in MARC clothing.]

The WorldCat database is full of them, and they in many cases duplicate existing AACR2 records.

NetFirst record

```

OCLC: 49844459
Type: a  ELvl: 3  Srce: d  Audn:  Ctrl:  Lang: eng
BLvl: m  Form: s  Conf: 0  Biog:  MRec:  Ctry: xx
      Cont:  GPub:  LitF: 0  Indx: 0
Desc:  tlls:  Fest: 0  DtSt: n  Dates: uuuu,uuuu
006      m u
040      N@F #c N@F #1 OCLCQ
082 04  551.6
082 04  551.6
245 00  National Weather Service (NWS): Office of Climate, Water, and Weather
Services #h [electronic resource].
516      World Wide Web Resource
520 8_  The Office of Climate, Water, and Weather Services of the National
Weather Service (NWS) of the U.S. National Oceanic and Atmospheric
Administration (NOAA) is headquartered in Silver Spring, Maryland. The office
oversees delivery of hydrometeorological and climate services. The office
provides information about its products and data analysis services.
610 24  United States. Dept. of Commerce. National Weather Service. Office of
Climate, Water, and Weather Services.
650 _4  Meteorological services.
650 _4  Climate.
651 _4  Silver Spring (Md.)
651 _4  Maryland.
856 40  #u http://www.nws.noaa.gov/om/

```

The same holds true for those records originally created for the OCLC NetFirst project, a database of records for online resources outside of World Cat; the records were not created according to AACR2 standards but were all dumped into CORC and WorldCat, many duplicated good AACR2/MARC records for the same resource.

Notice the absence of a publication area (260 field) and various notes, etc. required by AACR2.

040 symbol N@F = NetFirst

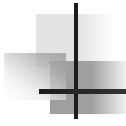


Modifying and maintaining IR records: range of issues

- Updating bibliographic information
 - Changes to reflect later iterations of the resource
 - Correcting obvious errors
 - Changes affecting access points
 - Giving information from earlier iterations in notes and added entries
- Changes to existing standards (AACR2, MARC 21; LCSH; Uniform titles)
- Upgrading minimal records
- Adding optional bibliographic elements
- Information from first or earlier iterations (e.g., earlier forms of title proper) given with notes and added entries if important
- Closing IRs that have ceased
- Modifying pre-AACR2 records
- Recataloging pre-AACR2 records (record conversion)
- Record consolidation (e.g., duplicate records or multiple records for different iterations of the same resource)

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This list has been derived and adapted from Module 21 of the CONSER Cataloging Manual, 2002 ed.



When to make a new record? (1)

- Very rarely! --That's the point of integrating entry
- General principle: make a new record when there is a new resource/work rather than another iteration of the same resource/work
- That is, when there is:
 - A new integrating resource
 - A merger of other resources (12.7B8b)
 - A split of an integrating resource into other resources (12.7B8c)
 - Original URI is still active but original resource is no longer available (LCRI 21.3B)

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When to make a new record? (2)

LCRI 21.3B: Make new record:

- Updating remote access electronic resources:
 - Only if resource continues to exist as resource separate from new resource to be cataloged
- Updating loose-leafs:
 - Make a new description only if there is a new base volume having a new date in the header/footer, etc. that is consistent throughout the base volume.
- Not for gradual replacement edition
 - i.e., the author or publisher considers the publication to be a new edition and issues a replacement title page with a new edition statement but does not issue a new base volume

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As of Apr. 30, 2003, **LCRI 21.3B**, is undergoing revision. The wording under “Updating loose-leafs” on the slide was supplied by CPSO, before the revised LCRI was released.



Electronic resource no longer available at original URI

- Original URI no longer active, but original resource still available at different URI
- Original URI still active, but original resource no longer available (i.e., not a different iteration of the original resource)
- See **LCRI 9.7B** for remote access electronic resources that are no longer available

23

LCRI 9.7B covers two situations:

- Original URI is no longer active
- Original URI is active, but does not appear to link to the original resource



Original URI no longer active

- Use an Internet search engine to determine if the resource described in the record is now available at a different URI
- If found, update 856 \$u in existing record
- If not found, LC practice:
 - Indicate in a note that the resource isn't findable (and the date you searched)
 - Include the reason, if known
 - Move the 856 \$u to 856 \$z
 - Suppress the bibliographic record from the OPAC

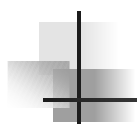
24



Different resource at old URI

- Treat the existing bibliographic record as on previous slides, depending on whether no longer available or available at a different URI
- Create a new record for the new resource if selected for cataloging

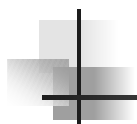
25



Ongoing maintenance questions

- **How to track changes?**
 - After cataloging is complete, how do you know when bibliographic elements in an online integrating resource have changed?
 - Serials and updating loose-leaves need to be checked in and new issues / iterations examined; changes can be spotted at that time; not so for remote access electronic resources
 - There are automated notification services for changes in URLs, but no way to automatically detect, for example, a change in title
- **Who will do it?**
 - Who will have authorization to update records (e.g. OCLC master records) for changes?
 - Will there be cooperative programs for record maintenance for IRs?

26



Conclusion

Catalogers will face complicated situations when cataloging electronic IRs in the 'real world'

- We have looked at several issues, including:
 - Searching for, identifying, and selecting existing records for copy cataloging
 - Modifying existing records cataloged under old rules and practices
 - Ongoing maintenance of records for integrating resources

27

Session 5

Case Studies in Cataloging Electronic Integrating Resources

1

Participants will use the Session 5 Case Studies a different version of the exercise, without the answer in their manuals rather than from these PowerPoint slides.

Instructors A copy of the exercise document that the trainees have in their manual follows the instructors version of Session 5 (printouts of PowerPoint slides with answers). Instructors may wish to use the trainee version in addition to the PowerPoint slides.

- These pages printed from the slides include instructor notes.
- The actual slides may be used when going through the exercises together as a class, to have something projected on the screen
- Or instructors may wish to work entirely from the pages in the trainees' manuals.

Object of Session 5:

- The object of this session is to explore four topic areas of commonly challenging or problematic issues involved in the cataloging of electronic integrating resources. The session will focus on group discussion and exploration of these issues, either in small groups followed by large-group sharing, or by the whole class. There will not always be clear-cut right or wrong answers.
- The primary point here is really the **discussion** of the challenges involved in these examples, the various possibilities and what might be the better solutions. It will probably help participants to explain to them that the point of Session 5 it is not to be a test of anyone's knowledge or abilities; most of these examples are purposely difficult or ambiguous cases that could cause even the most experienced online resource cataloger to scratch her/his head and require some time and thought to figure out, and for which there may in many cases simply not be one single right or wrong answer!

Pacing this session:

- Depends on amount of time available, whether workshop is 1, 1½, or 2 days in length
 - You can have students work through the cases individually, in pairs, in small groups, and then come back for discussion among the whole group,
 - Or work through the cases together with the whole and concentrate on group discussion

Suggestions:

- If there is sufficient time: let students chose to work individually or in groups of 2 or 3 according to their preferred learning styles
- Then have whole class go through exercises together; if enough time, individuals or groups could volunteer or be called on to share their answers
- If time is running short, the instructor can go through exercises together with the whole class all at the same time

Goals for Session 5

1. Apply concepts, rules, and principles learned in this workshop to more complex situations
2. Explore special issues and challenges in cataloging online integrating resources:
 - 1) Choice of Type of record and Type of computer file codes
 - 2) Selecting chief source and transcribing title and statement of responsibility
 - 3) Ascertaining and recording publication information
 - 4) Creating and updating records for changing content

2

Instructors are free to add, delete, edit, and/or substitute different examples and case studies.

Each Case study includes:

A particular topic to be explored and discussed

A set of questions for discussion of the issue

A set of screen shots of different resources or iterations of the same resource that illustrate the issues

Possible solutions with further discussion points

Additional issues for exploration might include (and could be added to future releases of these master materials):

- Ascertaining and recording frequency of updates
- When and how to create linking entry fields for relationships with other resources

Instructor References

The Instructor is advised to review and consult the following for this session:

- MARC Type of Record and Type of Computer File codes and their definitions in MARC 21 Format for Bibliographic Data and OCLC Bibliographic Formats and Standards.
- Interpretive notes on type of Record and Type of Computer File codes in Word document pages for this manual for Session 5 Case Studies.
- Guidelines for Coding Electronic Resources in Leader/06 / Library of Congress:
<http://lcweb.loc.gov/marc/ldr06guide.html>
- Cataloging Electronic Resources: OCLC-MARC Coding Guidelines:
<http://www.oclc.org/oclc/cataloging/type.htm>
- Use of Fixed Fields 006/007/008 and Leader Codes in CONSER Records:
<http://lcweb.loc.gov/acq/conser/ffuse.html>
- Chapter 9 and 12 rules for chief source of information, area 1 (title and statement of responsibility), and area 4 (publication, etc.).

Case Study Topic #1

Choice of Type of Record ("Type" / OCLC workform) and Type of Computer File ("File") codes

Discussion questions:

1. What is the best choice of Type and File codes for each of the following resources based on the surrogates given (resources 1A-1G)?
 - Use the lists of codes and explanations given in appendix B.
2. When is it difficult to determine whether a Web resource is primarily textual/language material or primarily computer-based?

3

Instructor background:

• MARC Type of Record (Leader/06 ; OCLC "Type")

- Since online integrating resources can contain almost any type of content, text, still or moving images, computer-based systems and services, etc., catalogers must select the Type of Record code that best characterizes the predominant or most significant content of the resource they are cataloging.
- Type of Record code "m" for computer file is restricted to four specific categories of electronic resources:
 1. computer software (including programs, games, fonts)
 2. numeric data [when computer-manipulable]
 3. computer-oriented multimedia
 4. online systems or services
 - [Note: Code "m" was re-defined to this narrower scope in June, 1997; MARC records for Internet resources prior to that time may reflect different coding practices.]
- If the resource does not fall into one of these four categories, it is cataloged using one of the other Type of Record codes that characterizes its most significant aspect.
- In case of doubt, or if the most significant aspect cannot be determined, consider the item a computer file and use Type of Record code "m".
- The most problematic areas tend to be in determination when a resource should be coded Type "a" vs. Type "m"
- The following documents provide guidance in making coding decisions:
 - Guidelines for Coding Electronic Resources in Leader/06 / Library of Congress: <http://lcweb.loc.gov/marc/ldr06guide.html>
 - Cataloging Electronic Resources: OCLC-MARC Coding Guidelines: <http://www.oclc.org/oclc/cataloging/type.htm>
 - Use of Fixed Fields 006/007/008 and Leader Codes in CONSER Records: <http://lcweb.loc.gov/acq/conser/ffuse.html>
- Note also that OCLC can change a master record if needed - contact OCLC quality control staff and they will make changes like type code changes when necessary.

Case Study Topic #1

Discussion questions, continued:

3. What constitutes "significant audio or video" that makes a Web site cross the invisible line from being text/language material to some other type for coding purposes?
4. What constitutes an "online system or service"?
5. What constitutes "interactive multimedia"?
6. When is numeric data text-based and when computer-based?
7. When should File code "m" be used?
8. How should we code databases of images, maps, or sound files as opposed to text?

4

Instructor background:

•MARC Type of Computer File (Computer File 008/26 and 006/09 ; OCLC "File")

- This element will always be included in MARC records for electronic resources, whether in the Computer Files 008 or 006.
- The determination of this value is made independently of the determination of the Type of Record value, although they are related.
 - For example, a resource that consists of numeric data will always be Type of Computer File code "a", but may be Type of Record code "a" or "m" depending on whether the data is presented in a static, textual, tabular way vs. a computer-manipulable way. In the first case it consists of data alone and in the second data + program(s).
- Codes that seem to present the most common problems for catalogers to determine when to use them, and which Type of Record code they may be used with:
 - d - Document
 - e - Bibliographic data
 - i - Interactive multimedia
 - j - Online system or service
 - m - Combination
- Web resources consisting mostly of HTML text with incidental images, hyperlinks, and/or search software are considered predominately textual and coded Type "a".
 - [recall that a book with pictures is still cataloged as text, not as image material, as would a photograph or a poster]
- Note the restricted scope of Type "m": it applies now only to four categories of electronic resource.
- The determination of whether a Web resource should be Type "a" or "m" is not always as easy to determine as one would hope. The rules do say, if in doubt, consider it to be Type "m". This topic will be explored as the first case study issue in session 5a.
 - See the additional guidelines in the Exercises-Session 5a Word document.
- Instructors are urged to study the following two documents and the examples contained in them:
 - (1) Library of Congress: Guidelines for Coding Electronic Resources in Leader/06: <http://lcweb.loc.gov/marc/ldr06guide.html>
 - Note especially the table of examples listed in Section 3 "Examples of types of electronic resources"
 - (2) Cataloging Electronic Resources: OCLC-MARC Coding Guidelines by Jay Weitz: <http://www.oclc.org/connexion/documentation/type.htm>

Resource 1A

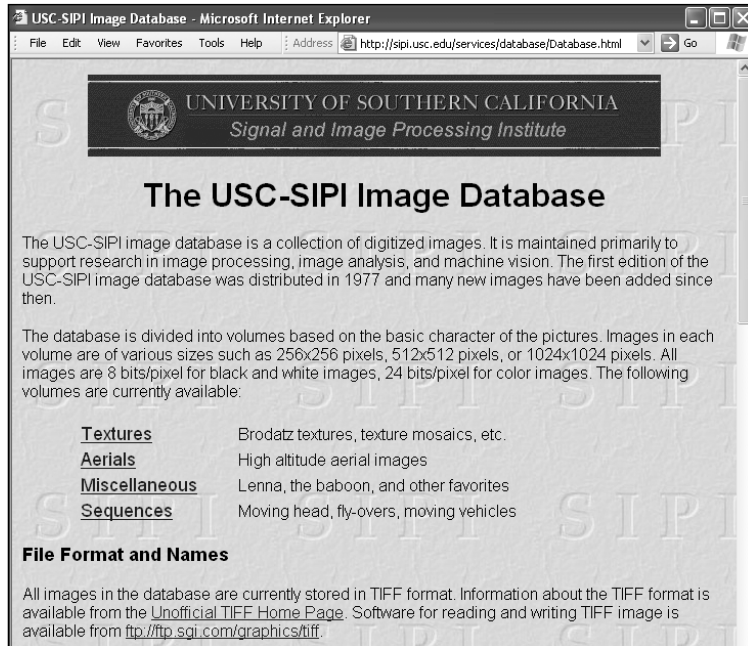


5

- Type: e – cartographic material
- File: c – representational

This resource is an online atlas. Although it contains a great deal of text and other images, its primary content is cartographic. The specific type of electronic resource, when selecting from the list of codes for the Type of computer files element, is representational, since the maps are representational images.

Resource 1B

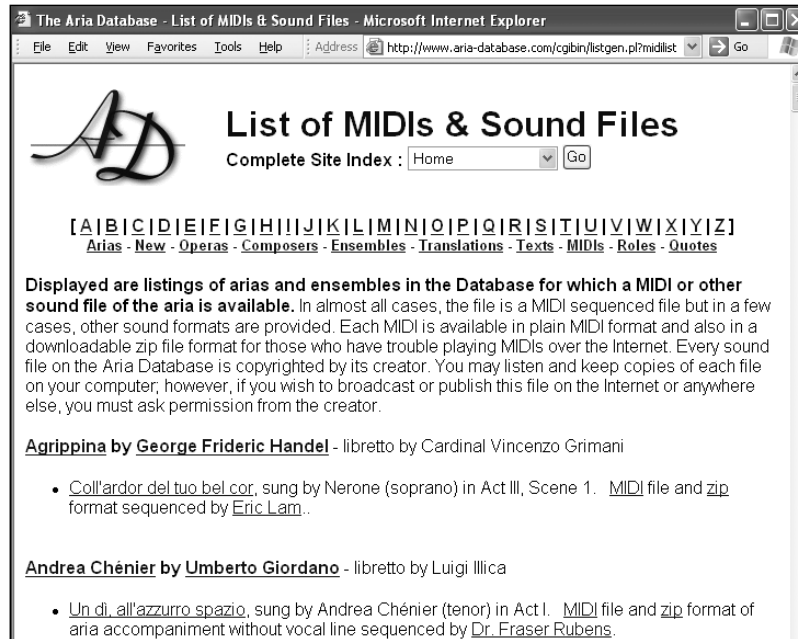


6

- Type: k – two-dimensional nonprojectable graphic, i.e., image data
- File: c - representational

This resource is a database of digital images. As such, its primary content is representational, image data

Resource 1C

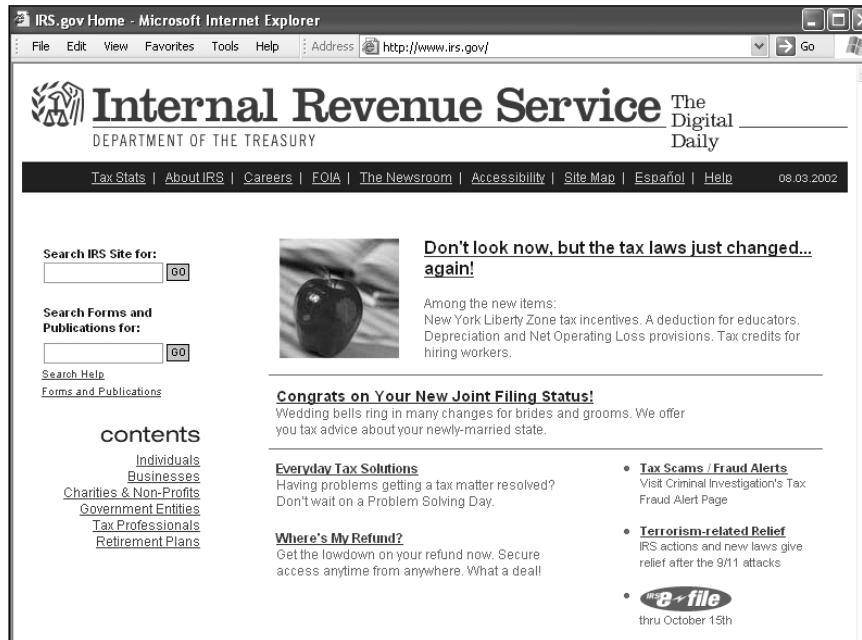


7

- Type: j – musical sound recording
- File: h - sound

This resource is a database of digital sound files, and from the screen shot we can see that it consists of music rather than spoken nonmusical sound recording material.

Resource 1D



8

- Type: a (language material) or m (electronic resource / computer file)?
- File: d (document) or m (combination) or j (online service)?

Notes for Instructor:

- This resource is a Web site that provides access to the Internal Revenue Service, PDF versions of tax forms, textual information about the services and tax information, tax statistics, but also links to information about careers with the IRS with interactive job search capabilities, current information about tax scams and fraud alerts, links to sites for electronic tax filing.
- This resource seems to entail more than just language material, seems to be more than simply a collection of textual documents. **Type** is best taken as either “a” or “m” rather than “a” --if in doubt as to which is best, choose m, per the guidelines.
- For the **File** code, is it best regarded as an “online service” or as a “combination” of multiple types (document, numeric data, programs, etc.? Either choice could be justified.

Resource 1E



9

- Type: a (language material) or m (electronic resource / computer file)?
- File: d (document) or m (combination)

Notes for Instructor:

•This resource is a Web site that constitutes LC's "virtual presence" on the Web. It includes information about the Library, contains links to its online catalog, many online exhibitions and digital collections of text, images, sound files, maps, etc., a featured Web cast, an online gift shop with interactive online shopping capabilities, etc.

•**Type** code "m" is the better choice for this Web site than 'a' since it includes so much more than simply text.

•**File** code "m" would certainly be appropriate.

Resource 1F



10

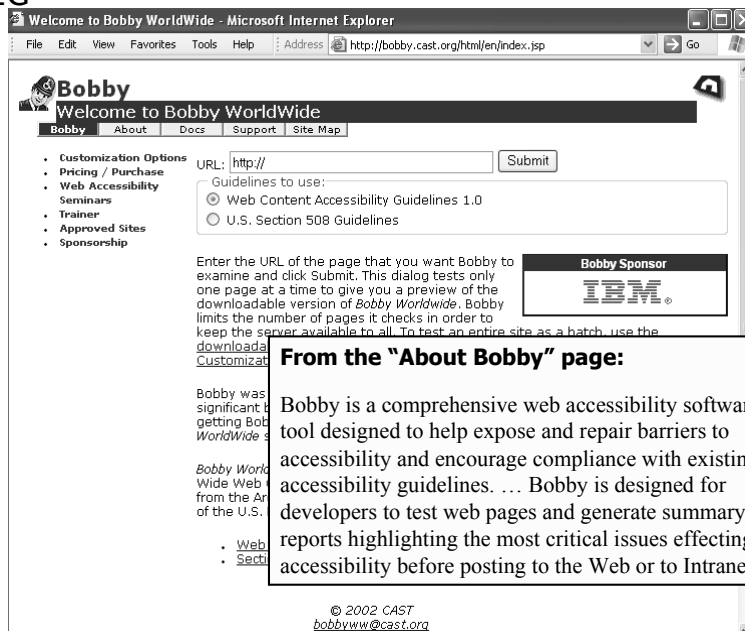
- Type: a (language material) or m (electronic resource / computer file)?
- File: d (document) or m (combination) or “e” (bibliographic data)?

Notes for Instructor:

•It may not be apparent from the home page alone, but this Web site is actually a collection of Web “portal pages” that consist of links to other resources. It does not actually contain content within this domain name aside from textual hyperlinks to other Web sites. It is therefore **Type “a”, language material**, and not Type “m”.

•The Type of computer file code might conceivably be taken as “e”, bibliographic data, since one might think of this as a set of citations, but this is probably stretching the intended definition of citations and bibliographic data. **File code “d” for document** is the better choice, since the resource consists of textual links. Or file code **“z” for Other** might also be a legitimate choice in this case. Otherwise File code “u” for Unknown could always be possible.

Resource 1G



11

- Type: m - electronic resource / computer file
- File: b – computer program

This resource is a Web resource that functions primarily as a computer program that tests Web pages for correct HTML and other formatting. The user submits the URL for a Web page and the program returns a set of results.

Case Study Topic #2

Selecting chief source of information and transcribing
title and statement of responsibility

Discussion questions:

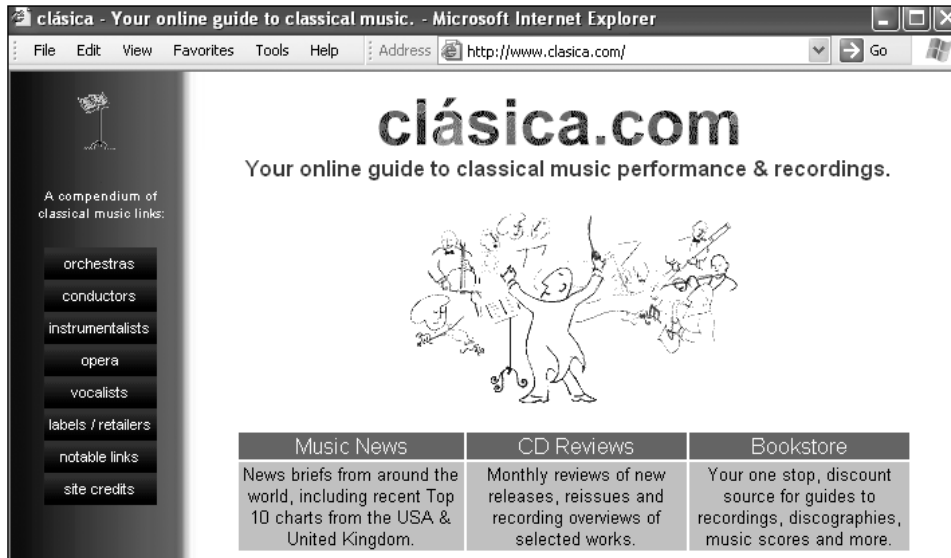
1. What is the best choice for chief source of information and title proper for each of the resources below (2A-2E)?
2. What would you have in your bibliographic record for:
 - 245 title and statement of responsibility
 - 246 variant forms of title
 - 500 source of title note

Case Study Topic #2

Discussion questions, continued:

3. Taking into account the changing nature of integrating resources, when might catalogers choose not to transcribe other title information after the title proper?
4. Are there cases in which an institution name that appears as a graphic or logo should be transcribed as a statement of responsibility if not taken as title proper?

Resource 2A



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Options:

- 245 00 Clásica.com \$h [electronic resource].
- 500 Title from home page. [or other wording]

- 245 00 Clásica.com \$h [electronic resource] : \$b your online guide to classical music performance & recordings.
- 500 Title from home page. [or other wording]

- 245 00 Clásica \$h [electronic resource].
- 500 Title from HTML header. [or other wording]

- 245 00 Clásica \$h [electronic resource] : \$b your online guide to classical music.
- 500 Title from HTML header. [or other wording]

- 246s for Clásica and Clásica.com
- Optional: 246s for title proper + subtitle combinations, including possibly spelling out ampersand in subtitle on home page title display.

No one absolutely correct or incorrect answer. But since the title display at the top of the home page presents a “fuller source,” it should probably be preferred as the 245 title proper, and the subtitle appears in one variation or another in both common source of information, it would best be transcribed in the 245 and 246 rather than omitted or covered by a 500 note.

Thus probably the best choice would be:

- 245 00 Clásica.com \$h [electronic resource] : \$b your online guide to classical music performance & recordings.
- 246 1_ \$i Title from HTML header: \$a Clásica : \$b your online guide to classical music
- 500 Title from home page. [or other wording]

Resource 2B



15

Three options for title proper:

- The INS online
- Immigration and Naturalization Service
- USINS Internet home page

Best choice: both “The INS online” or “USINS Internet home page” appear to be intended as formal titles. Either choice is fine for the 245 title proper, with the other given in a 246.

Also consider giving a 246 for “Immigration and Naturalization Service”

This might also be transcribed as a statement of responsibility, and could be taken as part of the formal title display on the home page and recorded like this:

- 245 04 The INS online \$h [electronic resource] / \$c Immigration and Naturalization Service.
- The question of whether or not the corporate body should also be a main entry is a separate questions not dealt with in this study.

Resource 2C (screen shot 1)



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Why is this a more challenging instance? The following rules from AACR2 are for instructor background:

1.1B8:

If the chief source of information bears titles in two or more languages or scripts, transcribe as the title proper the one in the language or script of the main written, spoken, or sung content of the item. If this criterion is not applicable, choose the title proper by reference to the order of titles on, or the layout of, the chief source of information. Record the other titles as parallel titles (see 1.1D).

1.1D2. *[Note: LC uses second-level description]*

In preparing a second-level description (see 1.0D2), give the first parallel title. Give any subsequent parallel title that is in English.

Wood Cree [GMD] = Les Cris des forêts

Einführung in die Blutmorphologie [GMD] = Introduction to the morphology of blood

Strassenkarte der Schweiz [GMD] = Carte routière de la Suisse = Road map of Switzerland

If, in preparing a second-level description, all of the following conditions apply:

- the title proper is in a nonroman script
- the first parallel title recorded in accordance with the instructions in the preceding paragraph is in a nonroman script
- no title is in English

give as the second parallel title the one that is (in order of preference) in French, German, Spanish, Latin, any other roman alphabet language.

In preparing a third-level description (see 1.0D3), transcribe all parallel titles appearing in the chief source of information according to the instructions in 1.1B.

Wood Cree [GMD] = Les Cris des forêts

Einführung in die Blutmorphologie [GMD] = Introduction to the morphology of blood = Ddtltybt d vjhajkjub. rhjdb

Strassenkarte der Schweiz [GMD] = Carte routière de la Suisse = Carta stradale della Svizzera = Road map of Switzerland

Resource 2C (screen shot 2)

<http://www.un.org>

The title in the title screen appears only when the user holds their cursor over the word "Welcome"; parallel titles in the other languages appears when the cursor is held over the other greetings.

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Note: the URL at the top of the slide will function as a live hyperlink to this Web site if you have a live Internet connection.

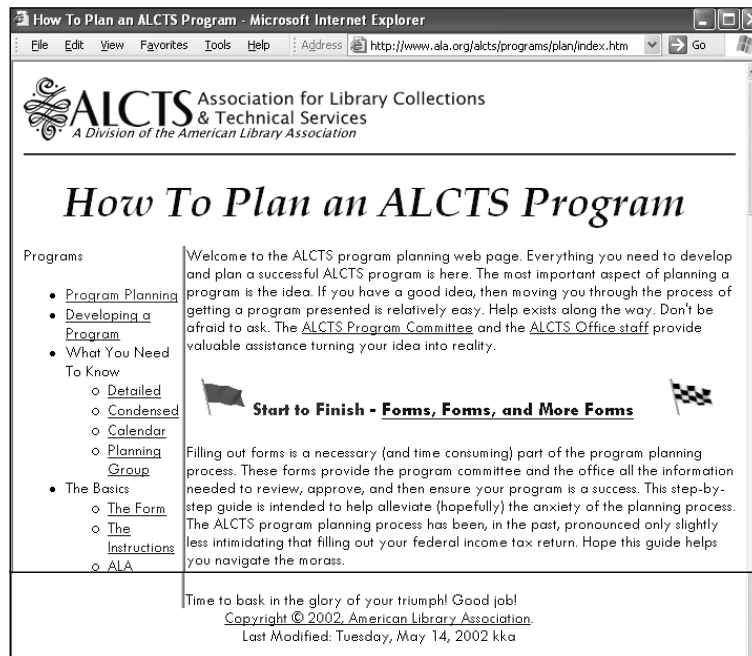
Resource 2C (screen shot 3)



18

- **The intention here is to catalog the entire site at the highest level, including all language variants, not just the English version.**
- Ask participants what are the possible titles/subtitles for the 245? They include:
 - Welcome to the UN : it's your world
 - UN : it's your world
 - United Nations : it's your world
 - Welcome to the United Nations
 - United Nations
 - United Nations home page
- Because of the multilingual complexity of the site, it may be virtually impossible to follow AACR2 1.1B8 and 1.1D2 for selecting the language of the title proper and two parallel titles for transcription. It may therefore be best to transcribe the title information from the HTML header (English) and explain the nature of the site and its initial screens in a note, including a 546 language note.
- We also have the complication of "Welcome to" in two versions of the title, this text string should be omitted per AACR2 1.1B1
- The HTML header title that is the one fixed constant, regardless of cursor position or selecting a specific language, but without the "Welcome to" phrase it consists of an primarily of acronym. Given all of this, perhaps the best choice for title proper is the fullest form of title found in English:
 - 245 00 United Nations home page \$h [electronic resource].
 - 246 3_ United Nations
 - 246 1_ \$i Title in HTML header of home page: \$a Welcome to the UN : \$b it's your world
 - 246 3_ Welcome to the United Nations
- We can also ask whether we might be being too overly concerned as catalogers about getting the "right" title proper or placing too much of an emphasis on transcription of every variation that appears. It seems that the creators of the site were not terribly concerned with presenting one uniform "title proper" for the Web site. How likely is it that users will search for the resource using some of these variations? How might this differ from the typical "known item search" for a title of a book? Possible suggestion: might users who do not know the Web site be most likely to search by the phrase "United Nations" over most other possibilities? If this might be so, to what extent can a cataloger take this into consideration when choosing what form of title to record in 245 \$a?

Resource 2D



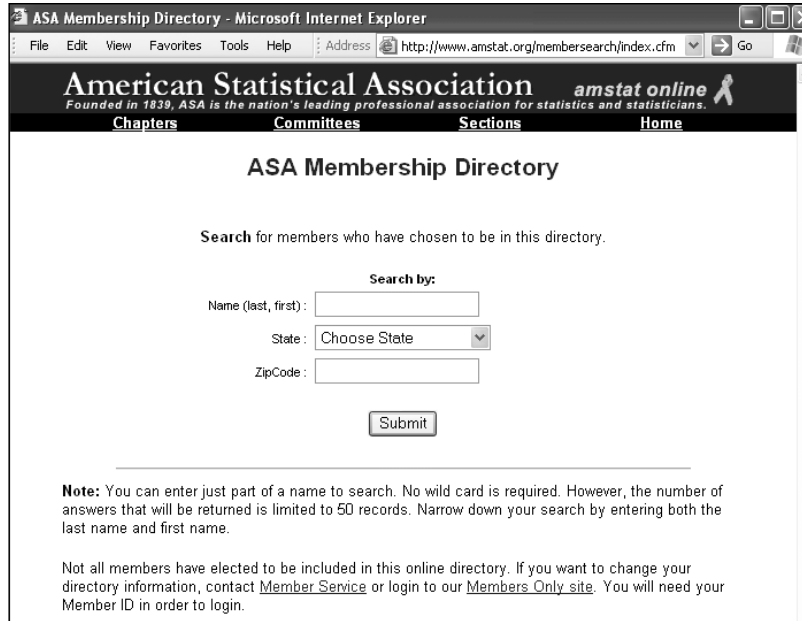
19

The title proper here is clear, based on both the page title display and the HTML header. Here, some catalogers might question whether or not to transcribe the name of the corporate body as a statement of responsibility when it appears as a graphical logo at the top of the home page.

Since the title proper has been determined, the name of the organization in this case should not be taken as a title or title variant; it could be transcribed as a statement of responsibility, as follows:

- 245 00 How to plan an ALCTS program \$h [electronic resource] / \$c Association for Library Collections & Technical Services.

Resource 2E



ASA Membership Directory - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address http://www.amstat.org/membersearch/index.cfm Go

American Statistical Association *amstat online*
Founded in 1939, ASA is the nation's leading professional association for statistics and statisticians.

Chapters Committees Sections Home

ASA Membership Directory

Search for members who have chosen to be in this directory.

Search by:

Name (last, first):

State: Choose State

ZipCode:

Note: You can enter just part of a name to search. No wild card is required. However, the number of answers that will be returned is limited to 50 records. Narrow down your search by entering both the last name and first name.

Not all members have elected to be included in this online directory. If you want to change your directory information, contact [Member Service](#) or login to our [Members Only site](#). You will need your Member ID in order to login.

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The possibilities for the 245 title and statement of responsibility this resource include:

- 245 10 ASA membership directory \$h [electronic resource].
- 245 10 ASA membership directory \$h [electronic resource] / \$c American Statistical Association.
- Note also:
 - “Amstat online” is the name of the larger Web site of which this directory is one sub-section (level of granularity)

Case Study Topic #3

Ascertaining and recording publisher, place,
and dates of publication

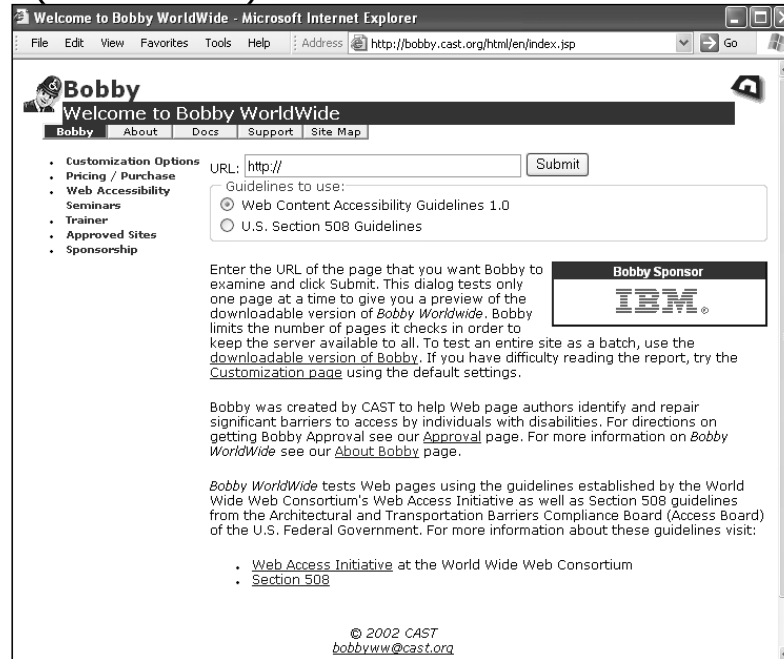
Discussion questions:

1. What is the place of publication and publisher name for each of the following two resources (3A-B)?
2. What are the dates of publication of each?
3. What would you give in a MARC record for fields 260 and, if applicable, 362 1, for these resources?
4. Is "hosting" a Web site the same thing as "publishing" it?

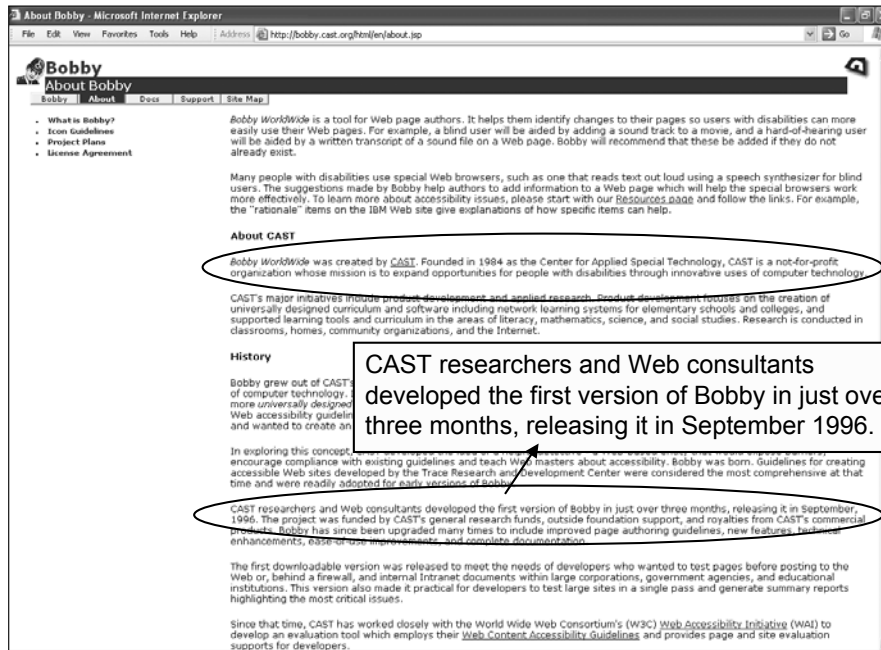
21

Hosting: consider the level of involvement of the host before thinking it is the publisher. Don't guess at a publisher or base solely on URL without a statement. If not ascertainable, use "[s.n.]".

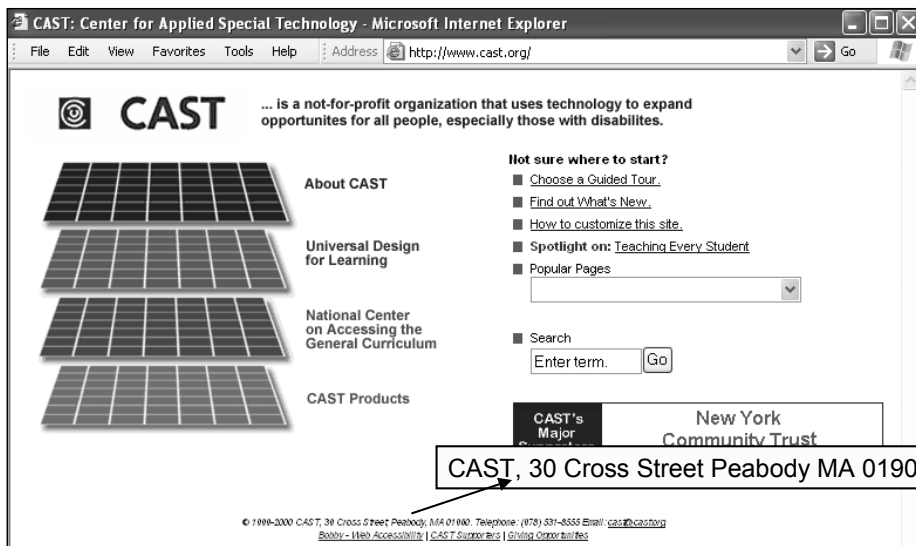
Resource 3A (screen shot 1)



Resource 3A (screen shot 2)



Resource 3A (screen shot 3)



24

Possibilities include:

- 260 [Peabody, MA] : \$b CAST, \$c [1996]- ← *suggested best choice*
- 260 [Peabody, MA] : \$b CAST
- 362 1_ Began in 1996.
- 260 [Peabody, MA] : \$b CAST
- 362 1_ Began in 1996?

Since the place of publication is taken from a source outside of the resource being cataloged (i.e., the CAST Web site, not the Bobby Web site), it must be given in brackets.

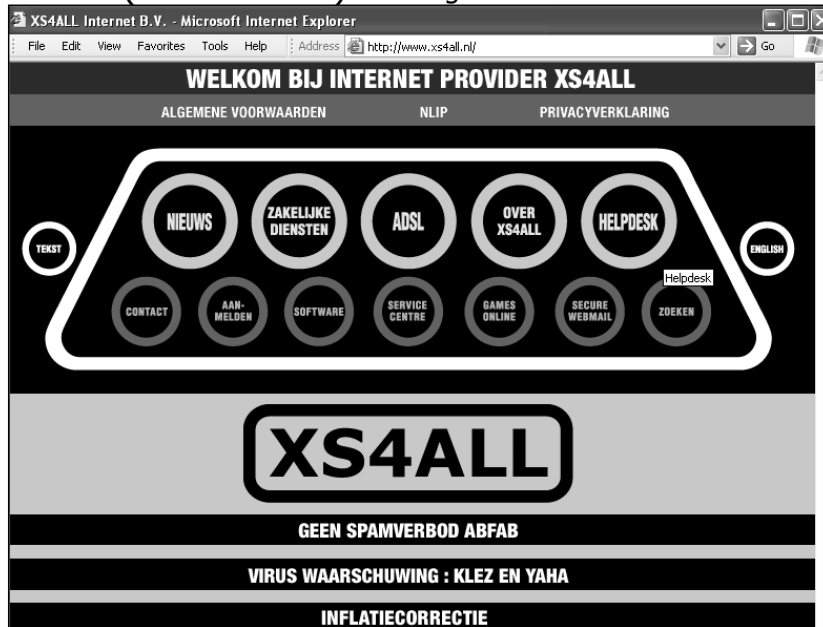
The copyright date of 2002 on the Bobby home page cannot be taken as either the beginning or ending date of this resource, and the range of copyright dates on the separate CAST page would normally be taken to refer to the CAST.org Web site and not the Bobby Web site.

But the “About Bobby” gives a statement that the first version of Bobby was released in 1996. This may be taken as an “explicit statement” of the beginning date, or might leave enough ambiguity that one might not take it as an explicit statement of the year that Bobby was first published online.

If this date is taken as an explicit statement of the beginning date, it must be entered in brackets in the 260 \$c because you are not cataloging from the first iteration of the Web site.

Resource 3B (screen shot 1): www.python.org hosted by XS4ALL

Resource 3B (screen shot 2): clicking on name "XS4ALL" →



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Python FAQ Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address  http://www.python.org/cgi-bin/faqw.py?req=show&file=faq01.007.htm Go

Python FAQ Entry

1.7. Is there a WWW page devoted to Python?

Yes, <http://www.python.org/> is the official Python home page.

[Edit this entry](#) / [Log info](#) / Last changed on Fri May 23 14:42:59 1997 by [Ken Manheimer](#)

[Python home](#) / [Python FAQ Wizard 1.0.3](#) / [Feedback to GvR](#)

Case Study Topic #4A

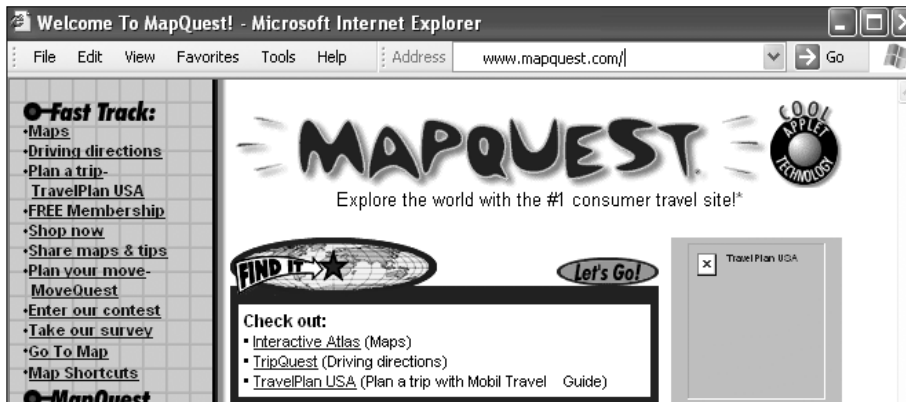
Creating and updating records for changing content

Discussion questions for Resource 4A:

1. How would you record the title proper and other title information for each iteration of the Mapquest Web site represented on the following slides?
2. Would knowing the frequency of changes for this title and other title information influence how you transcribe the title proper and especially other title information?
3. At what point might you use a 547 title complexity note instead of multiple 247s?

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Resource 4A, Jan. 11, 1998:



29

Participants can jot down on paper, if time, the 245, 246, and 500 source of title note for each of these selected iterations and compare them with one another.

Note in each screen shot:

- Title display on home page
- Title in HTML header / browser title bar
- Possible subtitles in both in addition to titles proper

Resource 4A, Nov. 10, 1999:



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Resource 4A, May 10, 2000:

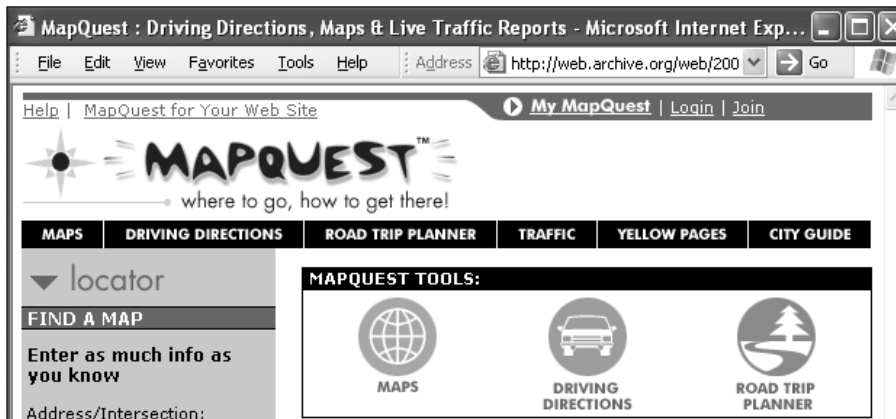


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Resource 4A, Oct. 1, 2000:



Resource 4A, Oct. 12, 2000:



33

Discussion points include the questions on the two initial slides for this topic.

We observe many changes and variations in the subtitles (other title information) for this Web site over time, and what we have are only random samples; there are probably more.

There is one constant throughout all the variations: the name MapQuest. In almost all iterations included here it would be taken as the title proper. The only other alternative might be to take "Mapquest.com" as the title proper for the 11/10/1999 iteration, if considered a "fuller form". But the constant prominence on the home page screen of the title "Mapquest" could indicate that it is the best choice for title proper.

There are basically three possibilities for handling this situation, with some variants on each:

1. Do not transcribe any instances of other title information. Exercise the cataloger prerogative stated in 12.1E to omit it if not considered important. Knowing that this information is continually changing would be a good reason to omit it from the Title and statement of responsibility transcription.
2. Transcribe the current other title information in the Title and statement of responsibility area (245 \$b) and record former subtitles in 246 fields. If choosing this option, how many would you record? All known instances? All instances that had been transcribed in previous iterations of the bibliographic record?
3. Note the changing subtitle information in a 500 note. This could be something as generic as "Subtitle varies." or include a list of some of the variants, perhaps as quoted notes.

Resource 4A, Aug. 10, 2002:



34

Possible suggestion:

245 00 MapQuest \$h [electronic resource].

500 Title from home page (viewed Aug. 10, 2002).

500 Subtitle varies.

520 [include key words and phrases included in some former subtitles, such as driving directions, maps, traffic reports, etc.]

6XX [also include some of those terms in subject headings]

Possibly also:

246 1_ \$i Former title in HTML header: \$a Mapquest.com \$f <Nov. 10, 1999>

Reactions?

Case Study Topic #4B

Discussion questions for Resource 4B:

- Look at the four selected iterations of this Web site home page represented on the following slides.
- 1. Knowing that this resource changes fairly radically every 4-8 years, how would this influence your original cataloging of the site as a whole? Think especially of what you would do, or not do, with the following:
 - o 520 summary note
 - o 505 formatted contents note
 - o 6XX subject headings
 - o 7XX personal and corporate name entries
- 2. Are there other cataloging issues you can think of that might arise from this type of Web site?

35

The main point of Topic 4B is to think about how to originally catalog and/or update a bibliographic record for a resource that undergoes a complete overhaul with the change of every presidency. It becomes almost a new site, and we might even question whether or not it becomes a “new work” such that a new bib record should be created for each new presidency. But the title of the resource and its electronic address (URL) remain the same, so we would need to move to some kind of uniform title to distinguish the different “works” if we went in that direction.

It is suggested that it is better to regard all as iterations of a single “work”, and to make the description and subject headings as broad as possible to encompass changes. The focus should be on this Web site being the virtual presence on the Web of the White House, regardless of its current occupant, and of the current U.S. President, Vice President, etc.

The cataloger will want to take this into account when coming the 520 summary note, making clear that this is the way the site works. Since this site first began under the previous president the first catalogers of this site could not know exactly what would happen with it when a new presidency began.

What do participants think about the wisdom of including a formal 505 contents note listing a “table of contents” of the current iteration of the site?

Would you want subject headings and names to be those of the current president, etc., or more general to encompass the US presidency in general?

Resource 4B, Dec. 1, 1998:



36

Resource 4B, Jan. 18, 2001:



Resource 4B, Feb. 2, 2001:



Resource 4B, Aug. 4, 2002:

Welcome to the White House - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://www.whitehouse.gov> Go

President [Coral Office](#) News & Policies [Vice President](#) [History & Tours](#) [First Lady](#) [Search](#)
[West Wing](#) [Oval Office](#) [Blue Room](#) [East Wing](#) [Library](#)

the *White House*
 Home President George W. Bush

Your Government Kids Only Español Contact Privacy Policy Site Map

Email Updates [More information](#) search

Welcome to the White House.

Today at the White House, Aug. 4, 2002

Radio Address by the President to the Nation
 Good morning. We've had a month of accomplishment in Washington. Congress acted on several important proposals to strengthen our national security and our homeland security and our economic security. Republicans and Democrats worked in a spirit of unity and purpose that I hope to see more of in the fall. [full story](#) [en Español](#)
[Audio](#)

President Bush Reflects on Major Legislative Achievements
 President Bush Friday discussed recent major legislative accomplishments including: Trade Promotion Authority, corporate corruption, funding for the war on terror, education, a reduction in taxes and the brownfields bill. [full story](#)
[Fact Sheet](#)

President Commends Bipartisan Leaders on Trade Agreement
 President Bush Thursday thanked Congressional Leaders for their work in passing the trade promotion authority bill which will open markets, expand opportunity and create jobs for American workers and farmers. [full story](#)
[Policy in Focus: Trade](#)

West Wing connections

Policies in Focus

- America Responds to Terrorism
- Homeland Security
- Economy & Budget
- Education Reform
- Medicare
- Social Security
- More Issues
- En Español

News

- Current News
- Press Briefings
- Proclamations
- Nominations
- Executive Orders
- Radio Addresses
- Discurso Radial

Appointments

- Application

Major Speeches

- Homeland Security Department
- Compassionate Conservatism
- Middle East Peace
- Global Coalition
- State of the Union

White House photo by Eric Draper
 President George W. Bush speaks to the media before departing the White House Friday afternoon, August 2, 2002.

Inside whitehouse.gov

America Responds to Terrorism
 The war on terrorism is being fought on two fronts: at home and abroad through diplomatic, military, financial and investigative actions. Learn more about this multi-faceted operation.

Session 5:

Electronic Integrating Resources: Case Studies for Discussion

Special Issues and Challenges in Cataloging Electronic IRs

Case Study Topic #1: Choice of **Type of Record** (“Type” and OCLC workform) and **Type of Computer File** (“File”) codes.

Discussion questions:

1. What is the best choice of *Type* and *File* codes for each of the following resources based on the screen print surrogates given? Use the lists of codes from appendix B along with the additional guidelines given below.
2. When is it difficult to determine whether a Web resource is primarily textual/language material or primarily computer-based?
3. What constitutes “significant audio or video” that makes a Web site cross the invisible line from being text/language material to some other type of material for coding purposes?
4. What constitutes an “online system or service”?
5. What constitutes “interactive multimedia”?
6. When is numeric data text-based and when computer-based?
7. When should File code “m” be used?
8. How should we code databases of images, maps, or sound files as opposed to text?

See Appendix B for the complete list of **Type of Record (Leader/06 ; OCLC “Type”)** codes.

Additional Guidelines for the exercise:

Use Type “m” Electronic resource (Computer file) for:

- 1. Computer Software**
 - When the resource consists of computer software, including programs, games and fonts.
- 2. Numeric Data**
 - When the resource consists of numeric data such as census or survey data that resides in a database and that is manipulable by computer. [Numeric data presented solely in eye-readable, tabular form and that is not manipulable by computer is the equivalent of a text document and is cataloged as language material (Type “a”)]
- 3. Computer-Oriented Multimedia**
 - When the resource consists of (1) the combination of two or more media, such as audio, video, images, animation, etc., and (2) no single aspect comprises the significant content.
- 4. Online System or Service**
 - When the resource constitutes an online system or service supports system-based user interaction. The presence of search software or of active hyper-links do not constitute computer programs and do not make resources online systems or services for cataloging purposes. In the area of online systems and services, consider whether the system itself (for example, a library system providing an interface to several databases), or the content of the several constituent databases, is being cataloged. When cataloging the system itself, use “Type” code “m” and “File” code “j”.

Examples of online systems or services include:

- Online library systems (consisting of a variety of databases)
- FTP sites
- Electronic bulletin boards
- Network information centers
- Campus-wide information systems
- Discussion groups or lists (via “listserv” or newsgroup)
- News and weather reports with system-based user interaction
- Airline reservation system
- Online stock investment site

Use Type "a" Language Material for:

- World Wide Web Sites, when the content consists of primarily textual Web pages with incidental images, hypertext links, or search software: ACLU web site
- Collections or databases of textual electronic serials with search software
- Web portal pages consisting of textual links to other resources
- Online bibliographic databases such as library online catalogs
- Numeric data presented in tabular form not manipulable by computer

References:

- Guidelines for Coding Electronic Resources in Leader/06 (Library of Congress):
<http://lcweb.loc.gov/marc/ldr06guide.html>
- Cataloging Electronic Resources: OCLC-MARC Coding Guidelines:
<http://www.oclc.org/connexion/documentation/type.htm>

Type of Computer File (Computer File 008/26 and 006/09 ; OCLC “File”):**Complete list of MARC Type of computer file codes:**

- a - Numeric data
- b - Computer program
- c - Representational
- d - Document
- e - Bibliographic data
- f - Font
- g - Game
- h - Sound
- i - Interactive multimedia
- j - Online system or service
- m - Combination
- u - Unknown
- z - Other
- | - No attempt to code

Additional Guidelines:

- **d - Document:** Use this code when Type of Record is “a” and the resource consists of textual content, containing mostly alphabetic information (words or sentences) converted into a code that can be processed, sorted, and manipulated by machine, and then retrieved in many optional formats. Use for records containing full text of documents and language material intended to constitute a textual document, whether represented as ASCII or image data. Code d includes both single bibliographic entities or a collection of bibliographic entities. Documents whose primary purpose is textual, even if search software is present, are coded with code d.
- **e - Bibliographic data:** Use this code when Type of Record is “a” and the resource consists of data that are bibliographic citations. This includes library catalogs or citation databases. The data may be in a structured or unstructured form. Search software may be present, but the purpose of the record is description of the content of the bibliographic data or database, rather than description of the online system or service.
- **i - Interactive multimedia:** Use this code when Type of Record is “m” and the resource described by the record supports navigation through and manipulation of many kinds of media (audio, video, etc.) in which the user has a high level of control, often allowing an almost conversational interaction with the computer and the data.
- **j - Online system or service:** Use this code when Type of Record is “m” and the record describes an online system or service (that may or may not contain bibliographic information). An online system or service supports system-based user interaction. If the focus of the record is to describe the system itself, with the content of the databases incidental contained therein, it is coded j. If the resource is an online file where the system is incidental to the description, it falls into another category. Examples of online systems or services are: online library systems (consisting of a variety of databases), FTP sites, electronic bulletin boards, network information centers, or campus-wide information systems.
- **m - Combination:** Use this code when Type of Record is of any type, but most often “m,” and the resource being described is a combination of two or more of the other types of files. Examples of combination resources include

computer models and numeric data files; computer programs and text files; and the like. When a World Wide Web site consists of significant audio and video, or of several types of data and the software to process the data, and/or if the cataloger is unable to determine predominance, use File code “m.”

Extract from “Guidelines for Coding Electronic Resources in Leader/06” (Network Development and MARC Standards Office, Library of Congress): <http://lcweb.loc.gov/marc/ldr06guide.html>:

3. Examples of types of electronic resources

Example	Ldr/06	008/26	006/09
Online Bibliographic Database LC-Books file Medline	a		e
Collection of online databases MEDLARS LOCIS LC-MUMS	m	j	
Web-based computer software The universal currency converter	m	b	
CD-ROM of a census with manipulable numeric data (Mono or serial) 1996 National and state summary data tables () Common core of data (CCD)	m	a	
Electronic serial with search software MLA international bibliography	a		e
Collection of electronic serials with search software JSTOR Project Muse	a		d
Electronic journal American imago	a		d
CD-ROM of a census in textual form (mono or serial) County business patterns	a		d
Online system or service Internet Grateful Med Airline reservation system Online stock investment site	m	j	
Web site with significant audio and video CNN Web site	m	m	
Web "portal page" (Web page with collection of links) Tools for serials catalogers	a		d

Resource 1A



Resource 1B:



Resource 1C:

The Aria Database - List of MIDIs & Sound Files - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://www.aria-database.com/cgi-bin/listgen.pl?midlist> Go



List of MIDIs & Sound Files

Complete Site Index :

[[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)]

[Arias](#) - [New](#) - [Operas](#) - [Composers](#) - [Ensembles](#) - [Translations](#) - [Texts](#) - [MIDIs](#) - [Roles](#) - [Quotes](#)

Displayed are listings of arias and ensembles in the Database for which a MIDI or other sound file of the aria is available. In almost all cases, the file is a MIDI sequenced file but in a few cases, other sound formats are provided. Each MIDI is available in plain MIDI format and also in a downloadable zip file format for those who have trouble playing MIDIs over the Internet. Every sound file on the Aria Database is copyrighted by its creator. You may listen and keep copies of each file on your computer; however, if you wish to broadcast or publish this file on the Internet or anywhere else, you must ask permission from the creator.

Agrippina by [George Frideric Handel](#) - libretto by Cardinal Vincenzo Grimani

- [Coll'ardor del tuo bel cor](#), sung by Nerone (soprano) in Act III, Scene 1. [MIDI](#) file and [zip](#) format sequenced by [Eric Lam](#).


Andrea Chénier by [Umberto Giordano](#) - libretto by Luigi Illica

- [Un di, all'azzurro spazio](#), sung by Andrea Chénier (tenor) in Act I. [MIDI](#) file and [zip](#) format of aria accompaniment without vocal line sequenced by [Dr. Fraser Rubens](#).

Resource 1D:

IRS.gov Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://www.irs.gov/> Go



Internal Revenue Service

DEPARTMENT OF THE TREASURY The Digital Daily

[Tax Stats](#) | [About IRS](#) | [Careers](#) | [FOIA](#) | [The Newsroom](#) | [Accessibility](#) | [Site Map](#) | [Español](#) | [Help](#) 08.03.2002


Search IRS Site for:

Search Forms and Publications for:

[Search Help](#)
[Forms and Publications](#)

contents

- [Individuals](#)
- [Businesses](#)
- [Charities & Non-Profits](#)
- [Government Entities](#)
- [Tax Professionals](#)
- [Retirement Plans](#)



Don't look now, but the tax laws just changed... again!

Among the new items:
New York Liberty Zone tax incentives. A deduction for educators. Depreciation and Net Operating Loss provisions. Tax credits for hiring workers.

Congrats on Your New Joint Filing Status!

Wedding bells ring in many changes for brides and grooms. We offer you tax advice about your newly-married state.

Everyday Tax Solutions

Having problems getting a tax matter resolved? Don't wait on a Problem Solving Day.

Where's My Refund?

Get the lowdown on your refund now. Secure access anytime from anywhere. What a deal!

- Tax Scams / Fraud Alerts**
Visit Criminal Investigation's Tax Fraud Alert Page
- Terrorism-related Relief**
IRS actions and new laws give relief after the 9/11 attacks
- e-file**
thru October 15th

Resource 1E:



Resource 1F:



Resource 1G:

Welcome to Bobby WorldWide - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://bobby.cast.org/html/en/index.jsp> Go

Bobby
Welcome to Bobby WorldWide

[Bobby](#) [About](#) [Docs](#) [Support](#) [Site Map](#)

- [Customization Options](#)
- [Pricing / Purchase](#)
- [Web Accessibility Seminars](#)
- [Trainer](#)
- [Approved Sites](#)
- [Sponsorship](#)


URL:

Guidelines to use:

☒ Web Content Accessibility Guidelines 1.0

☐ U.S. Section 508 Guidelines

Enter the URL of the page that you want Bobby to examine and click Submit. This dialog tests only one page at a time to give you a preview of the downloadable version of *Bobby Worldwide*. Bobby limits the number of pages it checks in order to keep the server available to all. To test an entire site as a batch, use the [downloadable version of Bobby](#). If you have difficulty using the default settings, see the [Customization page](#).

Bobby Sponsor


Bobby was created by CAST to help Web page designers identify significant barriers to access by individuals with disabilities. For more information on getting Bobby Approval see our [Approval](#) page. For more information on Bobby Worldwide see our [About Bobby](#) page.

Bobby WorldWide tests Web pages using the guidelines from the World Wide Web Consortium's Web Access Initiative and the Architectural and Transportation Barriers Compliance Program of the U.S. Federal Government. For more information:

- [Web Access Initiative](#) at the World Wide Web Consortium
- [Section 508](#) of the Rehabilitation Act

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bobbywww@cast.org

From the “About Bobby” page:

Bobby is a comprehensive web accessibility software tool designed to help expose and repair barriers to accessibility and encourage compliance with existing accessibility guidelines. ... Bobby is designed for developers to test web pages and generate summary reports highlighting the most critical issues effecting site accessibility before posting to the Web or to Intranets.

Case Study Topic #2: Selecting chief source of information and transcribing title and statement of responsibility.

Discussion Questions:

1. What is the best choice for chief source of information and title proper for each of the resources below (2A-2E)?
2. What would you have in your bibliographic record for:
 - 245 title and statement of responsibility
 - 246 variant forms of title
 - 500 source of title note
3. Taking into account the changing nature of integrating resources, when might catalogers choose not to transcribe other title information after the title proper?
4. Are there cases in which an institution name that appears as a graphic or logo be transcribed as a statement of responsibility if not taken as title proper?

Resource 2A

clásica.com
Your online guide to classical music performance & recordings.

A compendium of classical music links:

- orchestras
- conductors
- instrumentalists
- opera
- vocalists
- labels / retailers
- notable links
- site credits

Music News	CD Reviews	Bookstore
News briefs from around the world, including recent Top 10 charts from the USA & United Kingdom.	Monthly reviews of new releases, reissues and recording overviews of selected works.	Your one stop, discount source for guides to recordings, discographies, music scores and more.

Resource 2B



Resource 2C (screen shot 1)



(2C - screen shot 2) Hold cursor of “Welcome” (English) and you see this:



(2C - screen shot 32) Click on Welcome and you go to this page:





Resource 2D

The screenshot shows a web browser window titled "How To Plan an ALCTS Program - Microsoft Internet Explorer". The address bar shows the URL "http://www.ala.org/alcts/programs/plan/index.htm". The page features the ALCTS logo and the text "Association for Library Collections & Technical Services, A Division of the American Library Association". The main heading is "How To Plan an ALCTS Program".

Programs

- [Program Planning](#)
- [Developing a Program](#)
- What You Need To Know
 - [Detailed](#)
 - [Condensed](#)
 - [Calendar](#)
 - [Planning Group](#)
- The Basics
 - [The Form](#)
 - [The Instructions](#)
 - [ALA](#)

Welcome to the ALCTS program planning web page. Everything you need to develop and plan a successful ALCTS program is here. The most important aspect of planning a program is the idea. If you have a good idea, then moving you through the process of getting a program presented is relatively easy. Help exists along the way. Don't be afraid to ask. The [ALCTS Program Committee](#) and the [ALCTS Office staff](#) provide valuable assistance turning your idea into reality.

 **Start to Finish - Forms, Forms, and More Forms** 

Filling out forms is a necessary (and time consuming) part of the program planning process. These forms provide the program committee and the office all the information needed to review, approve, and then ensure your program is a success. This step-by-step guide is intended to help alleviate (hopefully) the anxiety of the planning process. The ALCTS program planning process has been, in the past, pronounced only slightly less intimidating than filling out your federal income tax return. Hope this guide helps you navigate the morass.

Time to bask in the glory of your triumph! Good job!
 Copyright © 2002, American Library Association.
 Last Modified: Tuesday, May 14, 2002 kka

Resource 2E:

ASA Membership Directory - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address http://www.amstat.org/membersearch/index.cfm Go

American Statistical Association *amstat online*
Founded in 1839, ASA is the nation's leading professional association for statistics and statisticians.

[Chapters](#) [Committees](#) [Sections](#) [Home](#)

ASA Membership Directory

Search for members who have chosen to be in this directory.

Search by:

Name (last, first) :

State :

ZipCode :

Note: You can enter just part of a name to search. No wild card is required. However, the number of answers that will be returned is limited to 50 records. Narrow down your search by entering both the last name and first name.

Not all members have elected to be included in this online directory. If you want to change your directory information, contact [Member Service](#) or login to our [Members Only site](#). You will need your Member ID in order to login.

Case Study Topic #3: Ascertaining and recording publisher, place, and dates of publication.**Discussion Questions:**

1. What is the place of publication and publisher name for each of the following two resource (3A-B)?
2. What are the dates of publication of each?
3. What would you have in a MARC record for fields 260 and, if applicable, 362 1, for these resources?
4. Is “hosting” a web site the same thing as “publishing” it?

Resource 3A (screen shot 1)

Welcome to Bobby WorldWide - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://bobby.cast.org/html/en/index.jsp> Go

Bobby
Welcome to Bobby WorldWide

[Bobby](#) [About](#) [Docs](#) [Support](#) [Site Map](#)

- [Customization Options](#)
- [Pricing / Purchase](#)
- [Web Accessibility](#)
- [Seminars](#)
- [Trainer](#)
- [Approved Sites](#)
- [Sponsorship](#)

URL:

Guidelines to use:

- ☒ Web Content Accessibility Guidelines 1.0
- ☐ U.S. Section 508 Guidelines

Enter the URL of the page that you want Bobby to examine and click Submit. This dialog tests only one page at a time to give you a preview of the downloadable version of *Bobby Worldwide*. Bobby limits the number of pages it checks in order to keep the server available to all. To test an entire site as a batch, use the [downloadable version of Bobby](#). If you have difficulty reading the report, try the [Customization page](#) using the default settings.

Bobby Sponsor

Bobby was created by CAST to help Web page authors identify and repair significant barriers to access by individuals with disabilities. For directions on getting Bobby Approval see our [Approval](#) page. For more information on *Bobby WorldWide* see our [About Bobby](#) page.

Bobby WorldWide tests Web pages using the guidelines established by the World Wide Web Consortium's Web Access Initiative as well as Section 508 guidelines from the Architectural and Transportation Barriers Compliance Board (Access Board) of the U.S. Federal Government. For more information about these guidelines visit:

- [Web Access Initiative](#) at the World Wide Web Consortium
- [Section 508](#)

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bobbywww@cast.org

Resource 3A (screen shot 2)

About Bobby - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address <http://bobby.cast.org/html/en/about.jsp> Go

Bobby
About Bobby

Bobby About Docs Support Site Map

- What is Bobby?
- Icon Guidelines
- Project Plans
- License Agreement

Bobby WorldWide is a tool for Web page authors. It helps them identify changes to their pages so users with disabilities can more easily use their Web pages. For example, a blind user will be aided by adding a sound track to a movie, and a hard-of-hearing user will be aided by a written transcript of a sound file on a Web page. Bobby will recommend that these be added if they do not already exist.

Many people with disabilities use special Web browsers, such as one that reads text out loud using a speech synthesizer for blind users. The suggestions made by Bobby help authors to add information to a Web page which will help the special browsers work more effectively. To learn more about accessibility issues, please start with our [Resources page](#) and follow the links. For example, the "rationale" items on the IBM Web site give explanations of how specific items can help.

About CAST

Bobby WorldWide was created by [CAST](#). Founded in 1984 as the Center for Applied Special Technology, CAST is a not-for-profit organization whose mission is to expand opportunities for people with disabilities through innovative uses of computer technology.

CAST's major initiatives include product development and applied research. Product development focuses on the creation of universally designed curriculum and software including network learning systems for elementary schools and colleges, and supported learning tools and curriculum in the areas of literacy, mathematics, science, and social studies. Research is conducted in classrooms, homes, community organizations, and the Internet.

History

Bobby grew out of CAST's underlying mission, which is to expand opportunities for people with disabilities through innovative uses of computer technology. In planning its own Web site, CAST researchers wrestled with the idea of how to make the entire Web more *universally designed*, i.e., more accessible and useful to all people, including those with disabilities. CAST examined existing Web accessibility guidelines, recognized the improbability of Web developers sitting down and reading a handbook of guidelines, and wanted to create an online tool Web designers could use to easily implement those guidelines.

In exploring this concept, CAST developed the idea of a helpful detective - a Web-based entity that would expose barriers, encourage compliance with existing guidelines and teach Web masters about accessibility. Bobby was born. Guidelines for creating accessible Web sites developed by the Trace Research and Development Center were considered the most comprehensive at that time and were readily adopted for early versions of Bobby.

CAST researchers and Web consultants developed the first version of Bobby in just over three months, releasing it in September 1996. The project was funded by CAST's general research funds, outside foundation support, and royalties from CAST's commercial products. Bobby has since been upgraded many times to include improved page authoring guidelines, new features, technical enhancements, ease-of-use improvements, and complete documentation.

The first downloadable version was released to meet the needs of developers who wanted to test pages before posting to the Web or, behind a firewall, and internal Intranet documents within large corporations, government agencies, and educational institutions. This version also made it practical for developers to test large sites in a single pass and generate summary reports highlighting the most critical issues.

CAST researchers and Web consultants developed the first version of Bobby in just over three months, releasing it in September 1996.

demonstration tool for users to try out this new version. For more information about ordering *Bobby WorldWide* visit the Pricing and Ordering Information page.

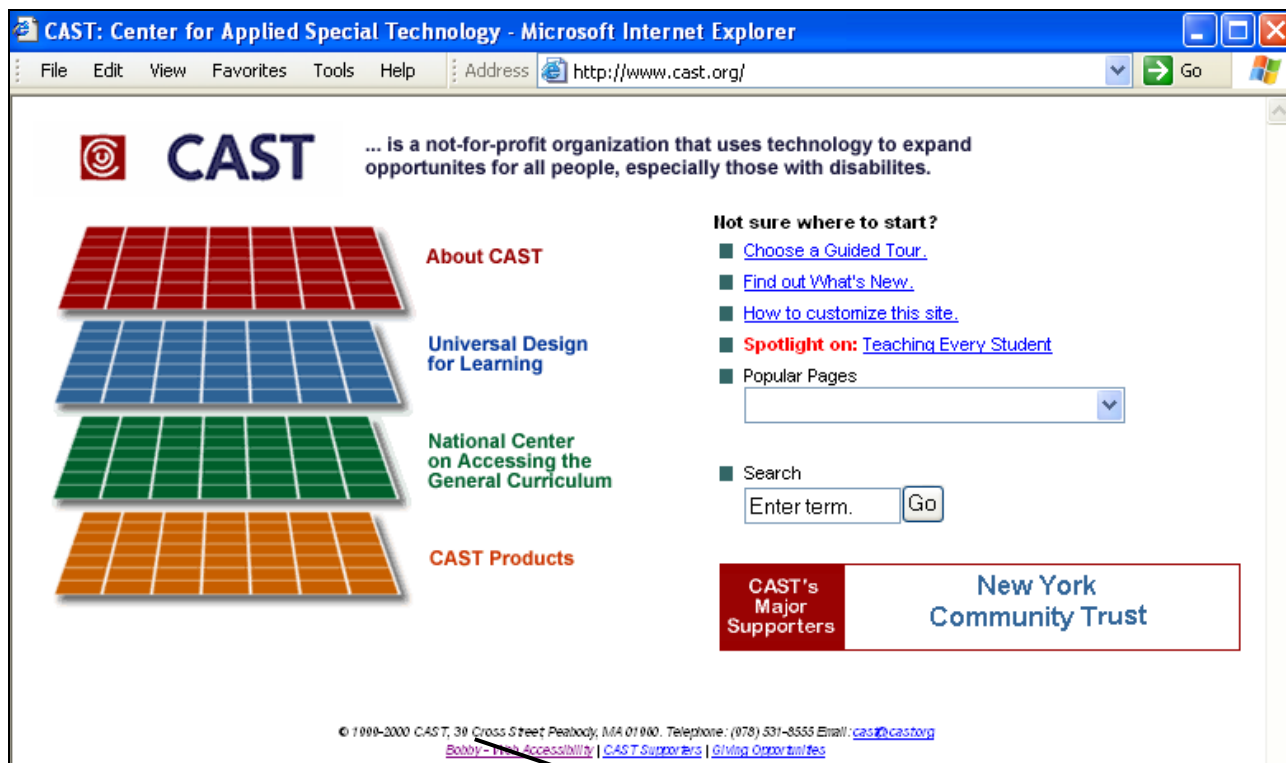
Credits

Conceptualization: Chuck Hitchcock, Josh Krieger
Product Manager: Michael Cooper
Project Administrator: Chuck Hitchcock
Design: Josh Krieger, Michael Cooper, Brian Matheny
Additional Design: Chuck Hitchcock, Keith Costorf, David Clark
Development: Josh Krieger, Keith Costorf, JEGANATHEN Prashanth Kumar
Support: Brian Matheny, Nancy Schick
Documentation: Josh Krieger, Michael Cooper, Brian Matheny, Nancy Schick, Keith Costorf
Content Language: Josh Krieger, Brian Matheny, Michael Cooper, Elizabeth (Boo) Murray
Web Site: Michael Cooper, Brian Matheny, Linda Butler, David Clark

Special thanks to CAST for its continued support, the WAI Web Content Guidelines Working Group, Wendy Chisholm, Gregg Vanderheiden, and Judy Brewer.

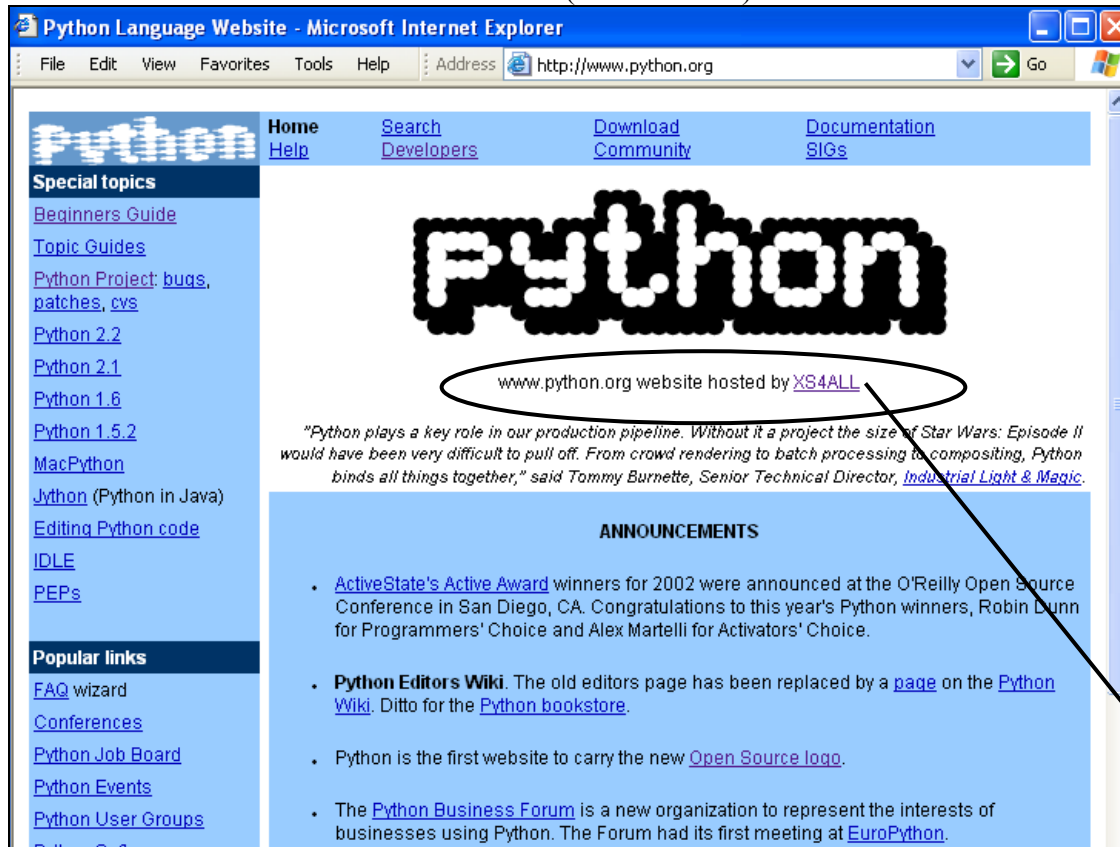
© 2002 CAST
bobbywww@cast.org

Resource 3A (screen shot 3)



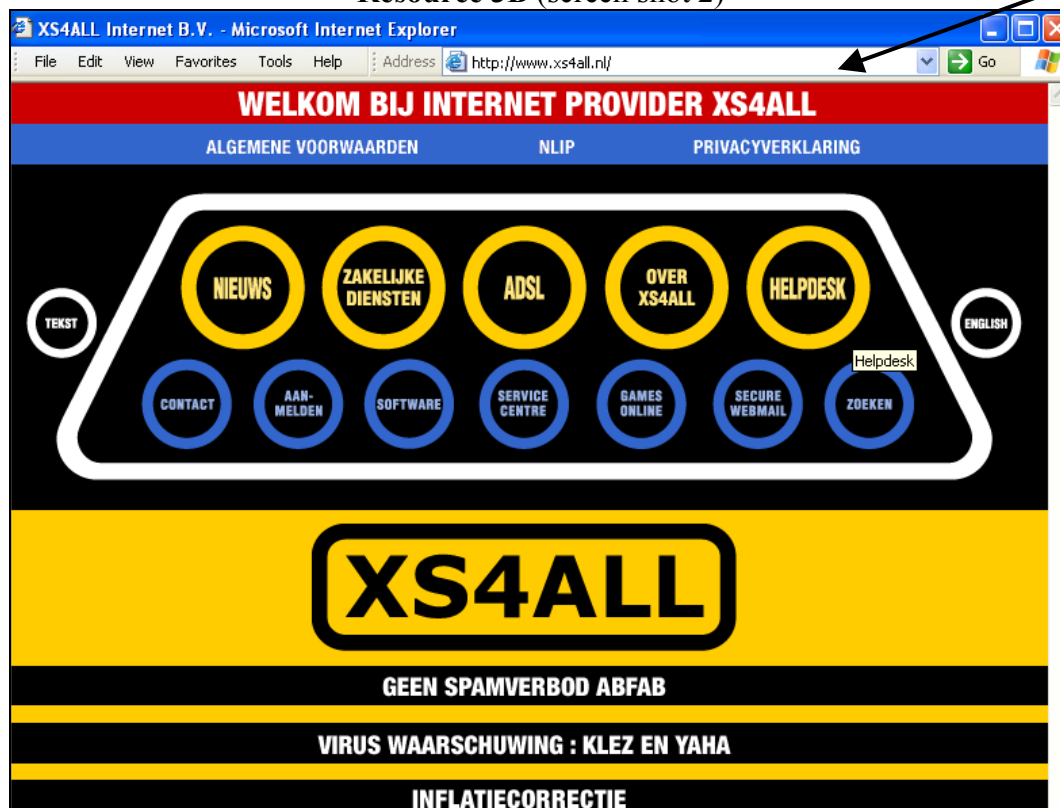
© 1999-2000 CAST, 30 Cross Street Peabody MA 01900

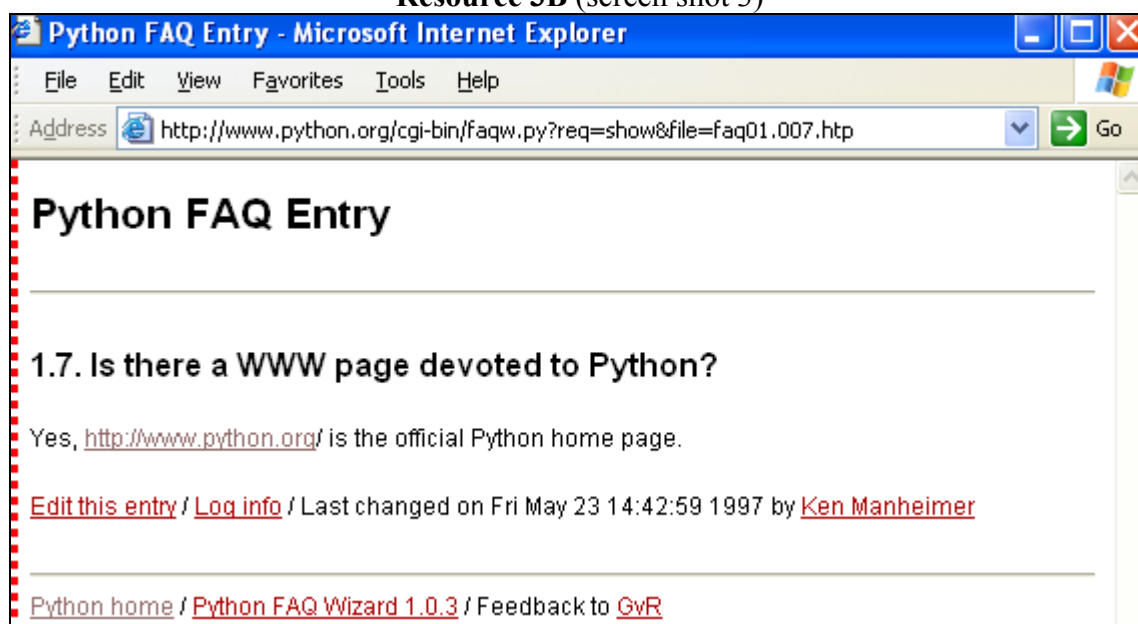
Resource 3B (screen shot 1)



[no further information appears at bottom of home page screen, FAQ, or other likely sources investigated]

Resource 3B (screen shot 2)



Resource 3B (screen shot 3)

Case Study Topic #4: Creating and updating records for changing content.

Discussion Questions for Resource 4A (Mapquest):

1. How would you record the title proper and other title information for each iteration of the Mapquest Web site represented below?
2. Would knowing the frequency of changes for this title and other title information influence how you transcribe the title proper and especially other title information?
3. At what point might you use a 547 title complexity note instead of multiple 247s?

Resource 4A (“Mapquest” Web site):

Dec. 2, 2002:



Jan. 11, 1998:



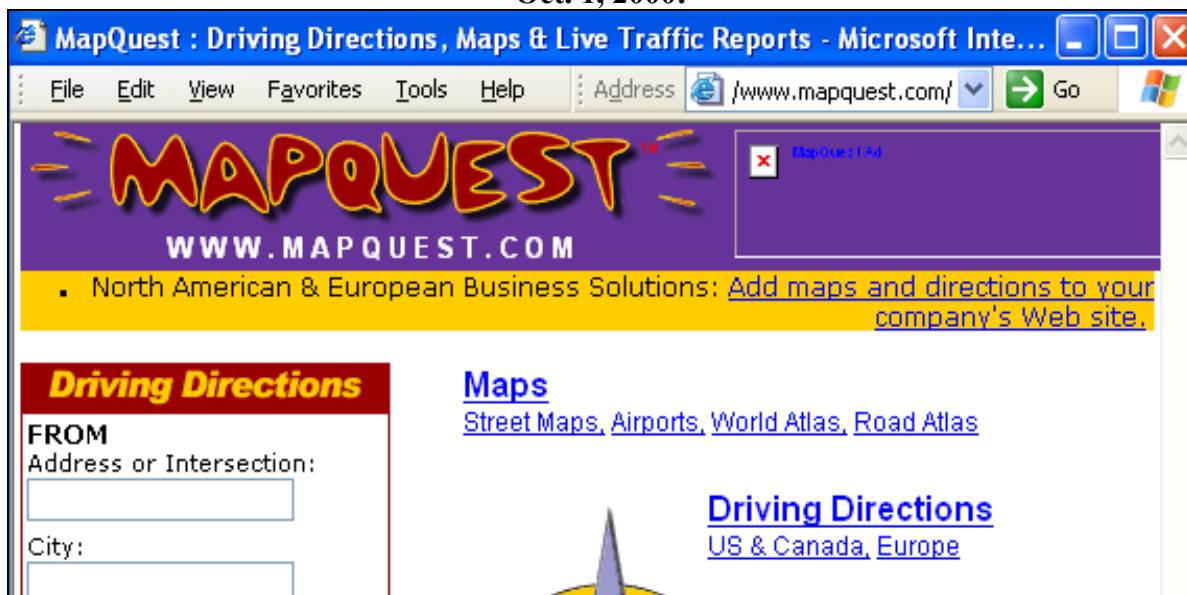
Nov. 10, 1999:



May 10, 2000:



Oct. 1, 2000:



Oct. 12, 2001:



Discussion questions for Resource 4B (White House):

- Look at the four selected iterations of this Web site home page represented below.
- 1. Knowing that this resource changes fairly radically every 4-8 years, how would this influence your original cataloging of the site as a whole? Think especially of what you would do, or not do, with the following:
 - 520 summary note
 - 505 formatted contents note
 - 6XX subject headings
 - 7xx personal and corporate name entries
- 2. Are there other cataloging issues you can think of that might arise from this type of Web site?

Resource 4B: Dec. 1, 1998: